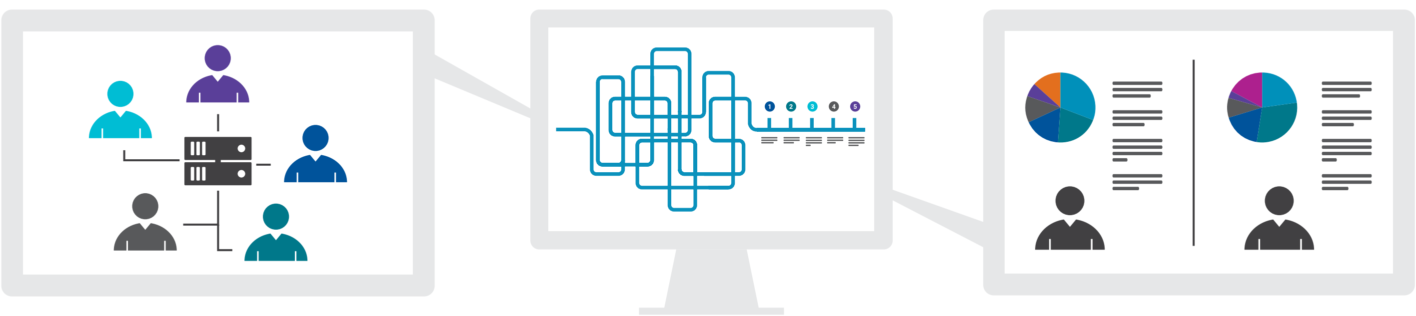
Scale Your Research With Nasdaq eVestment Research Management

Intensive manager research is central to what you do. Ensure that your research – from documents and notes to commentary and reviews – are centralized and secure with Research Management.

Centralize your firm's manager research assets

Bring efficiency to your process with workflow triggers and reminders

Document your due-diligence methodology for your board or other stakeholders



Use Research Management To

Centralize your manager research assets
Findability sounds like a tech term, but it's actually a problem many research teams face everyday. They know they have deep research on a strategy or manager, but it's just not findable. It's hidden on a chaotic shared drive or dispersed across analysts.

Educate clients and stakeholders
Increasingly, boards, families and other investor stakeholders want to more fully understand the process behind how particular managers have been chosen. With a purpose-built platform for manager research, it's easy to show your due-diligence process, step by step.

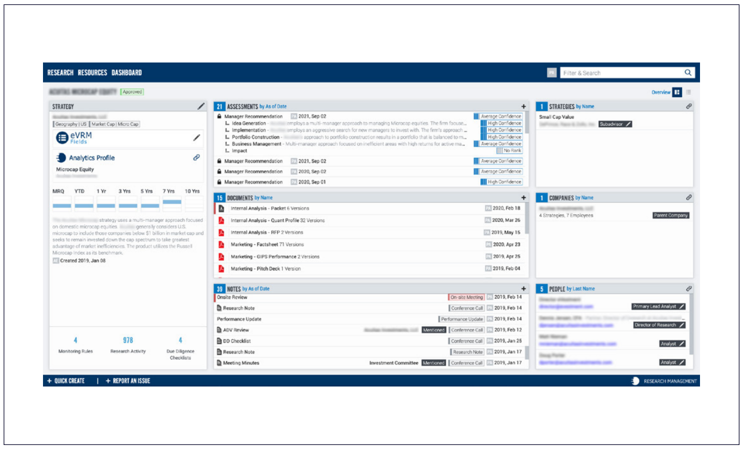
Bring efficiency to your research process
Your research team has a well defined due-diligence process for screening managers, but you're still relying on emails to remind people of review deadlines or pending approvals. Automated workflow frees you to do what you do best — research, analyze and think — and lets technology take care of reminders.

Research Management Capabilities

Research Management is the only purpose-built research management platform designed for institutional manager research. Other platforms are designed for investment research with the expensive functionality required to track individual securities, but Research Management is specifically designed for public pensions, corporate plans, endowments, foundations, family offices and other organizations that research money managers. Our RMS also integrates with Nasdaq eVestment data on 27,800+ institutional strategies from 3,600+ long-only and hedge fund managers worldwide.

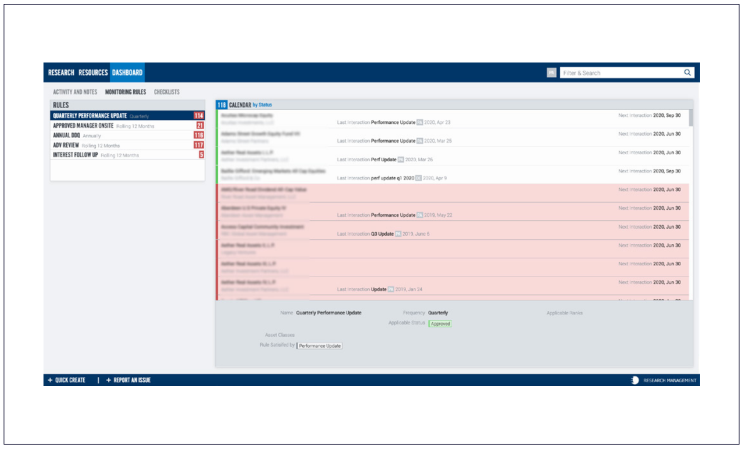
Centralized Manager Research & Intelligence

Project and document libraries ensure all your information is in one place. Just drag-and-drop files to upload them to a library and link email correspondence with Outlook integration.



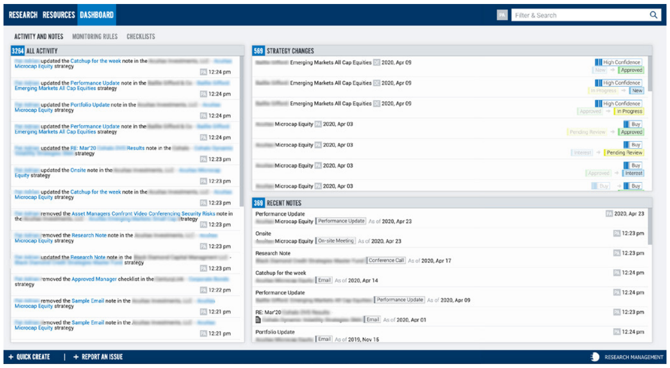
Compliance Governance

Research Management makes it easy for teams to adhere to compliance guidelines – every time. Ensure your disclosures are up-to-date and reports match your brand guidelines, with automated compliance monitoring, a due diligence calendar and packet builder.



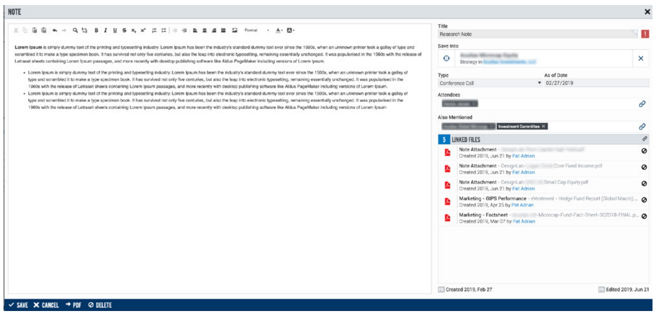
Track Activity

View and monitor the status of research and review activities across your firm. Instantly see your firm's approved manager list and manage your research pipeline using customized asset classes and factors. Automated tracking ensures you're able to document the firm's opinions and recommendations over time for better internal analysis and communication with stakeholders or clients.



Capture Interactions

Use quick notes on your laptop or mobile device to capture meeting notes, attendees and documents related to the interaction. These artifacts are all searchable so you can find them quickly later.



Linked to eVestment data on 27,800+ strategies

Link managers to their eVestment profiles to always have the latest reported data on performance, risk, portfolio characteristics and more.