

The Importance of Data Population for Building Brand Awareness

Asset managers, depending on the asset class of the products, can be expected to report a vast amount of data about their firm and products to eVestment. The information ranges from high-level firm details down to individual portfolio holdings, and every bit of information in between that a consultant or asset owner would need to make informed comparisons and decisions. The data is expected to be reported because asset owners and consultants rely on it.

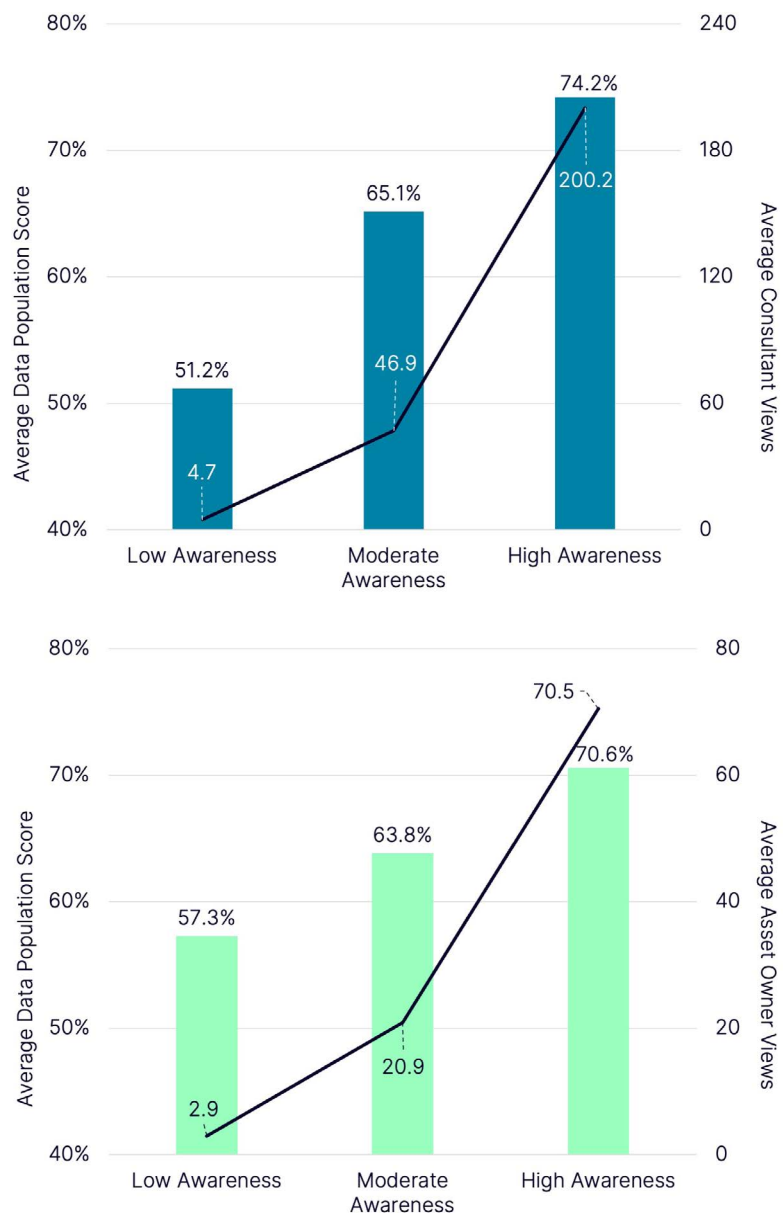
There is evidence illustrating a relationship between high brand awareness scores and firms who diligently share information, and low rankings for those with poor data reporting standards. Any firm which takes their branding seriously should be aware of the impact of their transparency, or lack thereof, on asset owners' and consultants' perception of their brand.

To illustrate the relationship between effective data reporting and brand awareness, we compare firms' prior quarter average data population scores against their current quarter brand awareness scores (based on their size category) in the two charts to the right and combine these with firm views in the current quarter. High brand awareness scores are defined as greater than 7, moderate brand awareness scores are between 4 and 7, and low brand awareness scores are less than 4. The data population score is our custom 50%/50% blend using each firm's aggregate firm-level profile complete score and their average strategy's aggregate product-level profile complete score, both from the prior quarter.

The results generally show managers that more effectively populate their firm and product profiles within the database attract broader and more in-depth interest from asset owners and consultants, thereby increasing their brand awareness scores.

Data Population and Average Views by Brand Awareness

*By consultant (top) and asset owner (bottom)
brand awareness score groups for firms of all sizes*



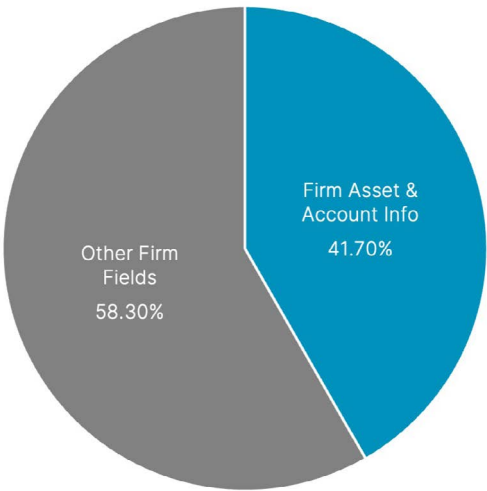


For inclusion in the Brand Awareness rankings, firms must provide a basic piece of information about themselves, their size, by the time the rankings are calculated. A firm’s total assets under management is one of the most screened upon firm-related fields by consultants and asset owners every quarter, yet it is sometimes still not reported to eVestment to the detriment of a firm’s greater marketing efforts.

Every quarter, there are firms whose products receive a meaningful number of views, but are excluded from the Brand Awareness rankings for not providing this one, highly screened upon field.

The following page lists firms who might have had highly ranked Brand Awareness scores based on elevated product viewership in the current quarter, but were unable to be ranked due to not populating the firm total AUM field within at least 90 days after the end of the prior quarter.

Firm-Specific Screens in Q1 2023



Product-Specific (excluding Performance & Scorecard Focused) Screens in Q1 2023

