



Simfund **Distribution**

Integrated Retail Distribution Analytics For Strategic Planning & Tactical Executions

Simfund Distribution is the newest addition to the Simfund Enterprise platform. Powered by the industry leading reporting engine, Simfund Distribution offers advanced analytics to strategically assess and monitor your distribution footprint and total opportunity across the most comprehensive set of product attributes including Fees, Return, Risk, Characteristics, and Peer Group Ranking.

A Single Point of **Integration**

Simfund Distribution provides a single point of integration across proprietary and third-party product and distribution datasets. Powered by an advanced, highly configurable user interface, Simfund immediately associates office level gross sales, assets and redemption data to:

- ▶ Return, Risk, and MPT Statistics
- ▶ Detailed Fund Fees
- ▶ Peer Group Ratings & Rankings
- ▶ Summary Fund Holdings
- ▶ Specialty Flags, Characteristics, Categories & Classifications

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Delivering Intelligent Analysis

As retail distribution becomes more complex and more expensive, Simfund Distribution simplifies data-driven analysis and helps fund companies quickly identify opportunities and monitor competitive threats. This unique integration of fund product and sales data enables strategy, product, business intelligence and distribution teams to develop and implement a coordinated approach to grow and retain assets under management.

Assess the Retail Distribution Landscape

- ▶ Map the largest and fastest growing distribution and outlets
- ▶ Analyze current positioning comparing metrics of product competitive and sales volume side-by-side
- ▶ Identify important sales trends reflecting changing market demand



Intelligently Identify Opportunities

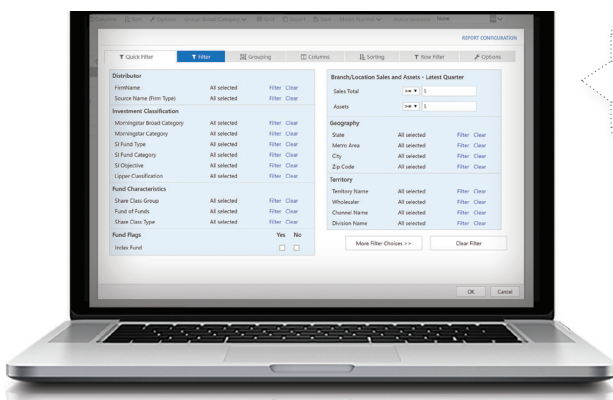
- ▶ Identify the top distributors and branches with demand trends that match products and initiatives
- ▶ Uncover opportunities to increase presence with new distribution partners and opportunities to expand footprint with existing partners



Focus Resources Most Efficiently

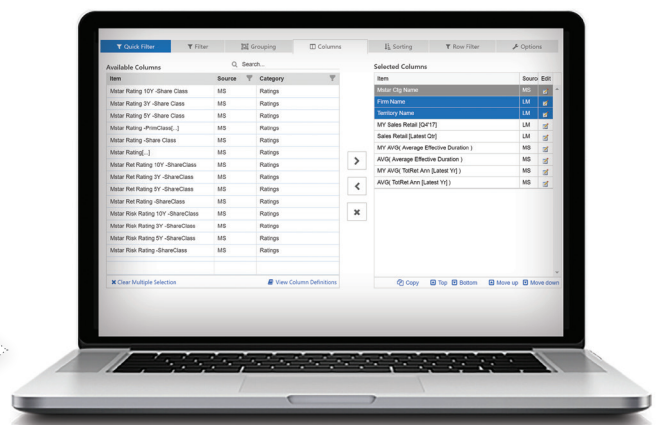
- ▶ Allocate distribution resources to capitalize on strengths, identifying specific locations where funds have quantifiable selling advantages
- ▶ Benchmark your firm's gross sales and redemptions with branch-level relative and absolute sales-weighted performance and fee averages

Enabling Flexible Analysis and Seamless Workflow



Select from and aggregate on product and sales characteristics, including your firm's custom territories

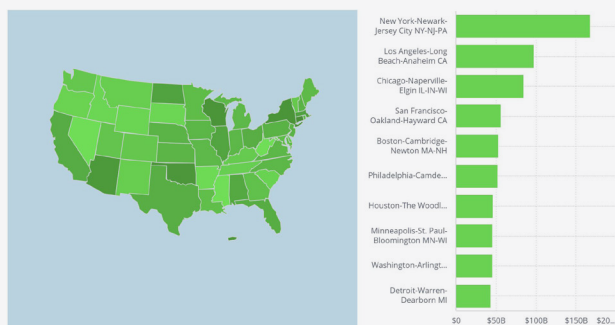
Display sales, redemptions, assets and sales-weighted product metrics



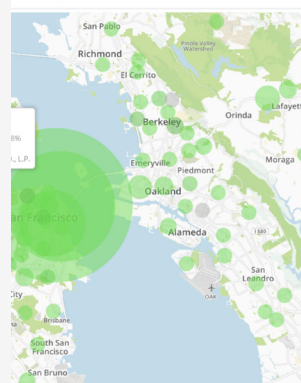
Align Targeted Sales Campaigns to Strategic Initiatives

Simfund Distribution moves beyond traditional market share and opportunity analyses to reveal previously unknown buying patterns to interpret market demand, optimize product placement, and focus distribution efforts.

View sales and opportunity through the lens of your firm's territory maps



Define opportunity and identify productive offices



Assess changes in share and market size with years of sales and redemptions data



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