

with.TFI

Traditional fund intelligence and analysis

Helping you raise assets
and grow your business

with.
Intelligence

New – **with.**TFI

Data and intelligence about the traditional asset management industry. Get comprehensive data, news and our exclusive commentary and analysts' perspectives.



With TFI is the new iteration of this data solution delivered via our new “With” platform. Search across our data sets, find and analyze the information you need quickly, and tailor the content to your interests.

Our original TFI blended Fund Intelligence and Fundmap, both previously standalone products, and both previously acquired by With Intelligence.

How **with.**TFI can help you

We help you find answers to the difficult questions.

With TFI helps you with asset raising, prospecting, and growing your business.



Stay informed – monitor people moves, asset allocations, pending searches and mandates (RFPs)



Get strategic intelligence on people to help you with tactical prospecting and business development and relationship building



Understand which products and asset classes are seeing inflows and outflows across the traditional asset management industry



Understand what asset classes, themes and strategies investment consultants are discussing with the prospective client base



Get early information on new and potential product launches



Identify and target your priority investors by region

With TFI helps you across a range of roles and business challenges including:

- Institutional sales
- Business developers
- Client relations
- Consultant relations
- Marketing professionals

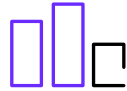
What information does **with.**TFI contain?

Our data empowers you to successfully target the right prospects, have conversations with the right investors and make the right investment decisions.

We deliver rich data on investors, mandates (RFPs), plus a rich source of proprietary intelligence on the industry, and its people including investors, managers and consultants.

We also have an exclusive, highly valuable dataset of investors' intentions and preferences.

Our information is simple to tailor to your interests, helping you isolate the information that's most valuable to you.



Your continuous stream of fresh, curated intelligence

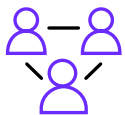
Your Now feed delivers intelligence that's been gathered by our researchers, reporters, and data analysts. As well as news stories and research reports, the Now feed includes Signals, our snippets of intelligence that alert you to a new opportunity or to competitor information such as fund closures, launches and people moves.

It's easy to personalize and create your personal curation of content covering the topics, strategies and regions that are most important to you.



Your daily email round up

Our daily email alert you to new opportunities and key news stories and Signals, so you stay informed without even accessing the product



A range of profiles

Investors

Covering a history of investment activities, strategy preferences, contacts and manager rosters to help you explore new business opportunities

Managers

Details of current clients by strategy and related mandates including awards, terminations and where the manager is 'on watch'

Consultants

Details of a consultant's expertise, investor relationships plus names, roles, locations and contact details of individuals, as well as historical manager recommendations by asset class and by field consultant



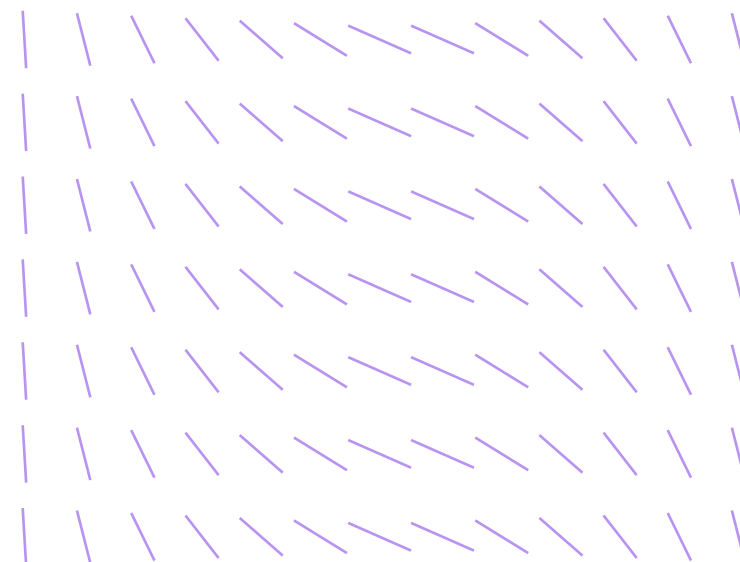
Granular investment portfolio data

- Actual vs target allocation %
- Strategy/geography data on manager rosters
- Activity components, showcasing the investors latest mandates and key related data points



Mandates

Get early access to opportunities from our comprehensive coverage of mandates. We include information from mandates (RFPs) and official listings that inform the market of money to be invested, how it will be invested, and the process that will be used to select the appropriate funds, giving you relevant, timely and concrete alerts.



Intentions and preferences

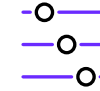
Investor intentions and preferences show you who is planning to allocate where and why, and these are clearly visible within the investor profiles. This information helps you to quickly assess potential alignment and identify opportunities. We gather this via regular direct contact and proprietary research so it's unique to us.



Intentions

Strategic intentions for the upcoming year. A typical example is:

- Planning international equity and international fixed income manager searches
- Interested in both emerging and developed markets but has a preference for developed
- Hesitant on emerging markets due to China
- Will look for equity manager with an ACWI ex-US or MSCI EAFE
- Looking for unhedged multi-sector bond funds, although has bias towards sovereign debt



Preferences/Manager selection

The investor's requirements for its managers to apply during their selection process.

Examples of selection criteria include:

- A three-year record for managers and their strategies is table stakes
- Prefers to have a minimum of \$100m in the strategy before it participates
- Is barred from investing in the following sectors: Tobacco, abortifacients, defence and weapons, stem cells, pornography

Our coverage

Our data is fresh, exclusive and spans the investment landscape. Our focus is on quality and providing rich and valuable information on the funds and opportunities that matter to you.

20,000+  investors

Around 7,500  investor contacts

Nearly 2,000  equity and fixed income mandates over the last 12 months

How we source our data

We complement data in the public domain with our detailed proprietary research.

Sources include company websites, LinkedIn and other social media, annual reports, regulatory filings, press releases and news coverage, desktop research, freedom of information requests and earnings calls.

Our proprietary data is harvested straight from the industry and enriched via:

- interviews
- questionnaires
- our bespoke events
- our industry relationships and proactive outreach to our industry connections
- intelligence that's submitted to us directly
- our freedom of information requests
- the intentions and preferences that investors share with us about their future investment plans.

with.TFI - make your day more efficient

Our interface is modern, easy to use and very flexible. You can integrate our rich dataset right into your workflow and use it to work more efficiently, create activities and ultimately find the best opportunities and make the best decisions.



Fast, effective searching

We've designed the platform to be easy to use, so it's simple to create even complex searches. We offer a range of filters – 39 in total – that you can combine to find very specific traits and save your searches for repeat use.



Extensive filtering options

Including:

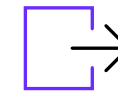
- Investor
- Investment
- Mandate
- Consultant
- Sector



Tailoring With TFI for you

One of the key benefits of With TFI is how accurately you can personalize it to your priorities and interests:

- Your curated Now feed of news and intelligence and Signals - all aligned to your interests for tailored monitoring
- Saved list formats and layouts that contain the information that's most important to you
- Extensive filtering options for highly specific searches
- My Account area to manage your filters, saved layouts and alert frequency



Export and integrate the data

You can easily download the information you need to your own systems in CSV or Excel format for further analysis. An Export preview is also available to give you more transparency, and certainty around your exports.

Develop your business using **with.**TFI



Helping service providers

Identify, and qualify, timely opportunities via the Now feed and our intelligence on key manager activities, to help you find the most relevant prospects to contact.



Helping asset managers

Identify new asset raising opportunities and track investor sentiment to understand how to position yourself for effective asset raising.

Also from With Intelligence

We organize and host summits and awards across the globe which are designed for and attended by leaders in the traditional asset management industry. They're the ideal opportunity to make connections.

Our flagship events include:

- Private Asset Management Awards, New York
- Fund Intelligence, Fund Operations & Services Awards, New York
- Pension Bridge ESG Summit, Los Angeles
- Pension Bridge Annual, Los Angeles
- Mutual Fund and ETF Awards, New York

About With Intelligence

We're a leading provider of data, intelligence and connections to the global asset management industry. Our investment intelligence supports allocating decisions, fund-raising and business development.

Our global team includes data scientists, analysts, reporters and journalists, technologists, developers and industry experts – all obsessed with revealing the detail on the asset management industry.

We deliver a unique blend of information that includes comprehensive data, news and our own exclusive commentary and our analysts' perspectives.

We're here to help you connect with the right people, the right intelligence and the right opportunities.

Free trial

Access With TFI to see how it can benefit you, help you with your business challenges and complement your workflows

To request a trial please get in touch

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🌐 withintelligence.com