

InvestWorks

InvestWorks® provides instant access to a powerhouse of high-quality decision support information on institutional and retail investments. It gives you the edge you're looking for.

Comprehensive Coverage

InvestWorks is powered by a comprehensive database of over 35,000 separate accounts, commingled funds, mutual funds, and exchange-traded funds. Over 1,100 benchmarks representing capital markets around the world augment this extensive product depth. Not only can you easily review all your options, you can directly compare separate accounts and commingled funds with mutual funds side-by-side.



The 2014 Consultant Relations Survey ranks Investment Metrics' EQuest database sixth overall and second among third-party "Must Be In" databases.

Trustworthy Sources, Reliable Data

InvestWorks sources global institutional data through EQuest, Investment Metrics' proprietary database. Asset Managers worldwide regularly supply their data directly to EQuest. Mutual fund and ETF data is sourced from Lipper, a Thomson Reuters Company.

Unsurpassed Peer Groups

Peer Groups, in InvestWorks, are the result of a four decade-long history of data collection and distribution. The Database Group at Investment Metrics carefully ensures the accuracy and completeness of data. The data then passes through a research-based, quantitatively-driven algorithm for initial assignment to peer groups before a database specialist finalizes each assignment. Investment Metrics' data-driven, research-based, quantitative, and qualitative approach sets InvestWorks apart as the leading source of peer group data.

Timely Updates

Institutional data becomes available in InvestWorks once asset managers provide a statistically significant portion of returns for the latest quarter.

- In the month immediately following the end of a quarter, data is updated three times:
 -  On or around the 15th day after quarter-end (over 60% of institutional data, 99% of mutual fund data, 100% of index data)
 -  On or around the 21st day after quarter-end (over 75% of institutional data)
 -  On or around the 30th day after quarter-end (over 90% of institutional data, all final updates)
- During all other months, the data is updated on or around the last day of the month.



Over 35,000 Products



Over 1,100 Benchmarks



Over 350 Peer Groups

Make informed decisions. Request a demonstration.

+1 (800) 581-7378 | investworks@invmetrics.com | www.investworks.com

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