

Assette and eVestment

ASSETTE 

 EVESTMENT®

Your reports and sales communications are your firm's calling card. They need to make a positive and lasting impression.

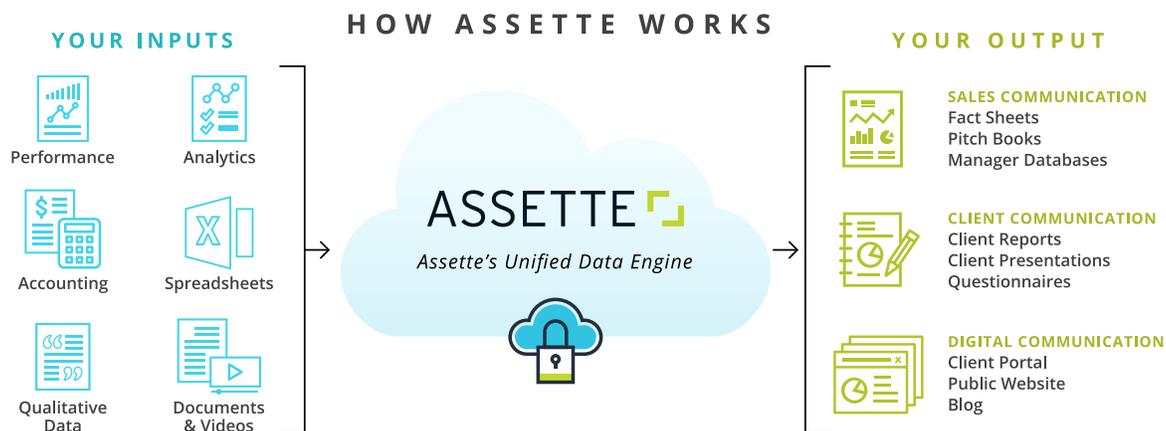
Your sales, client and digital communications enable you to share insights and new perspectives strengthening the relationship you have with your clients – but only if you have accurate data.

From databases to spreadsheets and even the occasional sticky note, most firms have varied and disconnected quantitative and qualitative data sets. Combining them into reports or presentations often requires countless hours of cutting and pasting, fixing broken spreadsheet formulas and then reviewing it all for errors.

The reality is, the more you manipulate data, the less accurate it becomes. At the same time, having accurate data is the most critical factor in sales and client communications.

Assette's pre-built connector integrates the eVestment data set

Using a pre-built connector, you can turn on the flow of eVestment data within Assette's cloud-based platform. The pre-built connector includes a variety of key product and firm data sets including benchmark, total AUM, strategy metrics and quartile rankings. This data is available within the Assette platform for quick and easy integration into sales, client and digital communications.



It has never been easier to integrate your eVestment data into your sales, client and digital communications.

No more risky cutting and pasting. No more investing time and money to build a custom interface and no more needless manipulation of data. Use your data with confidence knowing that it has gone from the source to the client.



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Assette and eVestment Omni

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Focus on enhancing client relationships instead of worrying about gathering data and updating manager databases.

Your database profile is your first chance to make an impression on institutional investors. Asset owners and consultants rely on database profiles to make crucial manager selection and retention decisions. Having accurate, complete and consistent information across manager databases in a timely manner is essential for your success.

Manually collecting data and populating multiple databases is inefficient. Gathering and calculating the sea of quantitative data – holdings, characteristics, performance, account types and AUM, to name a few – can be daunting, with data residing in different systems and multiple formats. Add the effort required to maintain firm, strategy and personnel information, and manual database updates require significant time, money and attention.

Assette fully automates the population of your Omni data.

Assette automatically pulls data from your accounting, performance and analytics systems to automatically generate the dataset required by eVestment Omni. With minimal effort, you can thoroughly populate databases faster than your competition. After all, it's inevitable, you are going to be asked how you compare against the competition.

Benefits of Assette + eVestment Omni

- **AUTOMATION WHERE YOU NEED IT**
Firm AUM, currency types across your holdings and other manual calculations you may currently do in Excel are all automated.
- **IMPROVED EFFICIENCY**
You enter firm, strategy and personnel information once into Assette and update only when there are changes. Each quarter produce the entire dataset for eVestment Omni in just a few clicks.
- **IMPROVED ACCURACY & CONSISTENCY**
Know with confidence that the data is accurate and consistent across all databases.
- **TIMELY UPDATES**
Highlight your operation efficiency to asset owners and consultants by having your data in multiple databases before the competition.
- **FOCUS ON HIGHER-VALUE ACTIVITIES**
Free up resources to better communicate and serve clients by automating mundane data gathering and database population work.

