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Business Intelligence for Fund Boards

The team at **FUSE** has served as a valuable resource and guide to investment managers and their fund boards for more than 30 years. Unlike most of today's board consultants and 15(c) report providers, the **FUSE** team has experience across the breadth of asset management firms -- from product and portfolio management to distribution and operations.

Our ongoing work with a broad mix of asset managers (size, focus, goals) ensures that we are on the leading edge of the developments that are shaping the competitive environment. This provides **FUSE** with a unique vantage point from which to deliver to fund boards a comprehensive perspective of changing market dynamics and the implications for their investment advisor.

A relationship with **FUSE** via our new *Business Intelligence for Fund Boards* offering will ensure that fund boards receive independent/objective analysis and insights that improve the effectiveness of their fiduciary oversight.

Business Intelligence for Fund Boards

Benefits of FUSE Business Intelligence service:

- Less risk of being surprised by marketplace developments
- Improved evaluation of strategic direction of the advisor
- Better informed decisions about product line expansion and requests for rationalization
- Objective assessment of advisor relative to peers
- Independent research that enhances board oversight

Directors will receive market updates that address:

- Industry Trends in sales, marketing, and product development as well as advisor/distributor developments
- Product Line Marketability – analysis of the relative strengths and weaknesses of the advisor's product line
- Competitive Positioning of the advisor with a focus on brand, positioning, and the sales/marketing functions
- Board Matters including developments in compensation, structure and other best practices benchmarks

Timing and Methods of Delivery:

✓ Annual – in-person custom-designed industry trends presentation; FUSE's analysis of fund administration agreements; product line review including fund level scorecards and fee analysis

✓ Quarterly – advisor 'management reporting', public asset managers and profitability analysis, investment vehicle trend updates (ETFs, CEFs, and Unlisted CETFs), and webinars and conference calls addressing specific issues and trends

✓ Monthly – access to **FUSE** original research (i.e., Mutual Fund & ETF Sales & Assets Highlights, Topic Briefs, etc.) as well as synthesis of leading industry news, reports and studies

For more details, including pricing, please contact Jason Heinhorst at 720.221.5223 or jheinhorst@fuse-research.com.