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Investics Announces Funds Benchmark Service

Weston, MA, US – April 22, 2024. Investics Data Services Company, Inc. is pleased to announce a new multi-asset class monthly benchmark service to evaluate fund manager performance more effectively. This new offering is an extension of the Investics Manager Evaluation Analytics (iMEA) product. Existing subscribers to iMEA will receive the benchmarking add-on service at no extra cost, while new standalone subscribers to the benchmark service can gain access very cost effectively.

The iMEA Benchmark service provides monthly performance results by surveying over 24,000 funds and best fitting them into one of over 150 benchmarks across 4 major asset classes and 13 broad allocations. Thus creating benchmarks of actual fund performance based on how funds really behave, as opposed to what the fund literature may declare. This helps enhance the analytical process by being able to calculate better aligned fund alphas which really reflect the rest of the fund management industry actual performance of similar portfolios instead of market based benchmarks of holdings which can lead to replication issues and potential false interpretation of performance results.

“With all the discussion of active vs. passive funds and whether fund managers are over or under performing their benchmarks”, says William Pryor, president of Investics, “now there is an apples to apples comparison of fund managers vs. fund managers to know if a fund’s performance is better or worse to other precisely comparable funds in general”.

A limited data view of the new iMEA Benchmark services is available at: <https://www.investics.net/benchmarks>.

The starting standalone iMEA Benchmark service subscription price is \$1,000 per quarter, with organizational discounts available for Registered Investment Advisors (RIA) - 85%, Asset Owners & Investment Consultants - 66%, Family Offices - 50%, Asset Allocators - 30% and Investment Management firms - 10-50% (depending on firm size). Discounts are applied into perpetuity until subscription is canceled. Please email sales@investics.com or visit <https://www.investics.net/subscribe#imea-benchmarks> for further information on subscribing.

iMEA produces forward looking excess returns due to skill for funds and investment management firms. Subscribers of the service can utilize a series of interactive dashboards to search, screen, view and analyze skill scores, economic value generated, ratings and rankings, along with other supporting statistics for over 24,000 share classes across 7,000 US registered funds, 700 investment management firms and 150 benchmarks.

Similar to the benchmark service, current iMEA annual subscription discounts are available for the iMEA “Full” and “Expert” versions at the same discount rates referenced above. A free one month trial is also available, with paid iMEA subscriptions starting at only \$250.

Investics focuses on and works in partnership with the global investor community offering insightful investment data and analytics capabilities, managed services and consulting. Headquartered in Weston, Massachusetts on the outskirts of Boston along “America’s Technology Highway”, Investics services clients globally. For more information on the Investics products and services suite, please visit www.investics.com. ###