

# Client Case Study

## Financial Services Provider

Financial Intelligence  
Informa

Our client has requested to remain anonymous. One of the world's largest financial services providers, they support their global client base with a full spectrum of investment solutions. Throughout this document we will refer to this client as 'FSP' (Financial Services Provider).

### How we help

FSP have been a client of Informa Financial Intelligence since 2015 and subscribes to our EPFR Flow and Allocation data and insight product.

Our main sponsor at FSP and his team of strategists utilize EPFR data in their reports and to get a good understanding of how plans are positioned across asset classes around the world. When asked about the value the data brought to his business, our sponsor commented; "I have not seen any comparable data for flow and allocation insight from any other provider in the industry. We have got used to how EPFR works and know how to get the most out of it."

EPFR data provides a unique view on investor and fund manager sentiment through its mutual fund and ETF flows and positioning data across global markets.

It is this insight that our sponsor has come to rely on; "We look to EPFR for pretty much everything related to positioning, as well as fund level data and looking at what is happening in a particular sector. We are currently trialing EPFRs Stock Flows data and it looks really good so far – we are able to aggregate the raw data ourselves so that we can create customized reports."

"If you are a macro-strategy team EPFR is a must. I don't think there is a better flow and allocation data provider in the market."

**MAIN SPONSOR, FINANCIAL SERVICES PROVIDER**

For the team at FSP, the care provided by the EPFR client services and support teams helps to ensure they can get the most value from their subscription; "Both teams provide us with good care and despite the difference in time zones, their response to our questions is quite timely."

### Considering EPFR as a data provider:

Informa Financial Intelligence Flow and Allocation data helps portfolio managers, asset allocators, strategists and research teams understand where money is moving, how fund managers are investing that money, and what impact those shifts are having on geographies, sectors, industries and securities.

Our sponsor at FSP would recommend EPFR to others who are considering onboarding a flow and allocation data provider, commenting; "If you are a macro-strategy team EPFR is a must. I don't think there is a better flow and allocation data provider in the market. If the current stock level database can be improved there is even more potential for EPFR to also benefit stock analysts as well."