

Client Case Study

Financial Services Provider

Our client is one of the world's largest financial services providers. They support their Latam client base with Corporate, Financial, ABS and SSA issuances. They subscribe to our EPFR Fund Flows and Allocations data weekly email alert, utilizing this insight to enhance the message they deliver to their clients. Our client has requested to remain anonymous; therefore, throughout this document we will refer to them as 'FSP' (Financial Services Provider).

How we help

FSP has been a client of EPFR since 2015, and subscribes to our EPFR Fund Flows and Allocations data and insight weekly email alert.

Our main sponsor at FSP and their Debt Capital Markets (DCM) team utilize EPFR data in their reports and to advise their clients. When asked about the value the data brought to the business, our sponsor commented: "The insight that we receive from EPFR has been, and continues to be, really helpful in aiding our roles as DCM advisors."

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. "EPFR adds value on an aggregate basis – enabling us to round out the picture we give to our clients", says our main sponsor.

Our sponsor has come to rely on this unique insight: "The EPFR email we receive is very to the point, we look at weekly and aggregate YTD flows against countries. We utilize all data points we receive to enhance the message we deliver to our clients. If we did not provide this, it would certainly be missed!"

Considering EPFR as a data provider

Monitoring fund flows helps investors and money managers to quantify the collective actions of investors. Fund flows, provide insights into underlying investor demand for funds, by geographic region, global sector, and asset class.

EPFR Fund Flows and Allocations data offers signals of changing investor sentiment and behavior, indicating the availability of liquidity from sources of capital and signals shifts in momentum, with the potential to move markets.

For the team at FSP, the dedication provided by the EPFR support team ensures that they receive the most value from their subscription; "I would totally recommend EPFR, our relationship with them overall is useful to us and we value the partnership. The service we receive has always been one of the deciding factors in continuing our relationship."

EPFR's Fund Flows and Allocations data helps financial professionals 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.

"We utilize the EPFR data we receive to enhance the message we deliver to our clients. If we did not provide this insight, it would be missed!"

Main sponsor, Financial Services Provider



ABOUT EPFR

EPFR is 'the intelligence behind intelligent decisions'. Our fund flows and asset allocation data track over 150,000 traditional and alternative fund shares classes with more than \$46 trillion in total assets, delivering a complete picture of institutional and retail investor flows and fund manager allocations driving global markets.

EPFR's market-moving data services include equity and fixed income fund flows on a daily, weekly and monthly basis and monthly fund allocations by country, sector and industry, providing financial institutions around the world with an unparalleled understanding of where money is moving.

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