



Client Case Study

Financial Services Provider

Our client is one of the world's largest financial services providers. They support their global client base with a full spectrum of investment solutions. 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 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 their 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 EPFR's 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."

For the team at FSP, the care provided by the EPFR Client Services and Support teams helps to ensure that 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

EPFR's Fund Flows and Allocations 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."

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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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