



# Iress FundsFlow

Intelligent insights, informed decisions



# Make informed decisions with the power of data at your fingertips.

Tired of piecing together data from multiple sources only to receive partial and delayed insights? Stay ahead of the curve with Iress FundsFlow — a centralised market intelligence platform designed to provide timely, actionable insights into capital flows.



## What is it and what are its features?

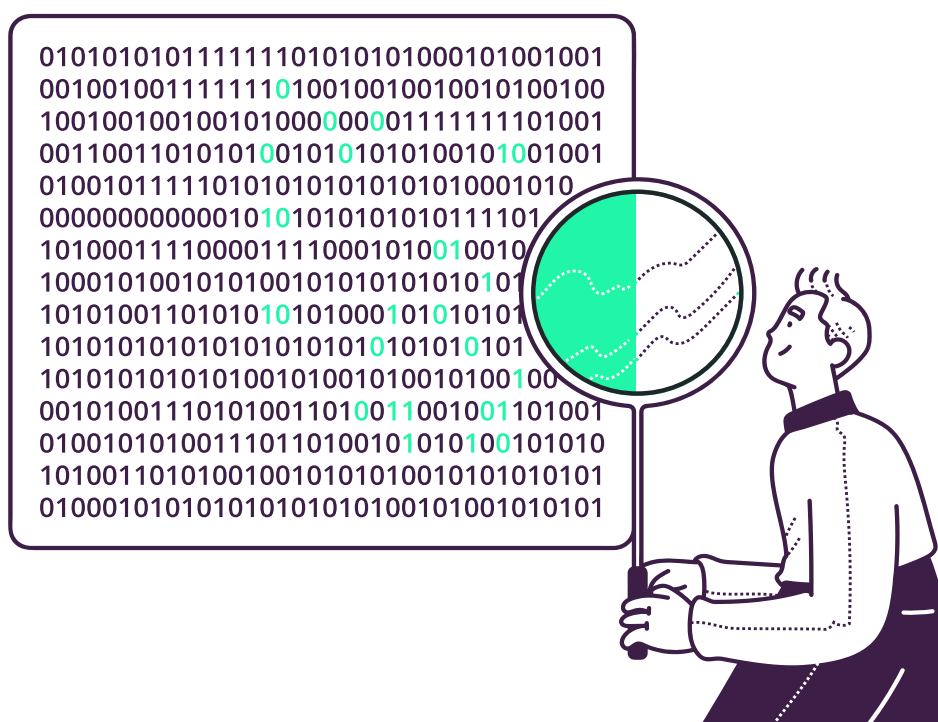
Iress FundsFlow offers data-driven insights into capital flows across investment products, asset classes, and platforms. By analysing portfolio transactions in a bottom-up manner from Xplan, it gives you an unparalleled view of market trends to help you stay competitive and informed.

**Iress' widespread coverage tracks over \$120b\* in annual flows from 7000+ advisors over a minimum 5 year period, with granularity of daily transactions across 10,000 underlying investments across the wealth management industry in the Australian Market.**

The investment flows derived with full lineage from the source of the investment decisions include detailed coverage across:

- Managed Funds
- ETFs
- SMA
- Intra-SMA transactions
- Stocks - domestic and international

The data is served up through a user-friendly front-end application that can be tailored to dynamically capture insights pertinent to product issuers, platform providers and researchers.



# With Iress FundsFlow, you'll have access to key trends and insights into:



## Product competitiveness

Dynamic peer group analysis at product, issuer and asset class levels



## Investment trends

Stay updated on trends across different asset investment types, such as managed funds, SMAs, ETFs and direct stock allocations



## Advisor segment behaviour

Understand how different segments are allocating their capital and making investment decisions - IFA, Dealer Group, Private Wealth and Service Brokers



## Platform and off-platform insights

Get deep insights into flow trends across different investment platforms by product, issuer and asset category, as well as direct allocations that are off-platform

## Why use it?

Stay ahead of the market with the critical information you need to adapt to changing market conditions and competitor dynamics. Designed for investment product issuers, Iress FundsFlow ensures you are always up-to-date with the trends and insights that matter most to your business through one centralised and interactive source.

## Interested?

Take control of your investment insights and stay one step ahead of the market with Iress FundsFlow. Ready for timely, actionable insights into where money is moving and why?

Contact us today at +61 (02) 8273 7000 to find out more.

