



Access Data and Strategic Insight Form Strategic Partnership to Expand Net New Flow Information for Distribution Channels

Released : 03 19 2012

LAKE SUCCESS, N.Y., March 19, 2012 /PRNewswire/ -- [Access Data](#), a [Broadridge Financial Solutions](#), Inc. (NYSE: BR) company, and [Strategic Insight](#), an Asset International company, today announced a strategic partnership to offer a new level of asset and net new flow information to the mutual fund industry. Under the terms of the partnership, these industry information leaders are combining forces to create unique, comprehensive offerings with industry asset and net new flow information for mutual funds and ETFs, segmented by distribution channels and financial intermediary firms.

(Logo: <http://photos.prnewswire.com/prnh/20120319/NY72026LOGO>)

The competitive data offerings enhanced by this partnership – Access Data's Market Intelligence and Strategic Insight's Simfund MF – will help asset managers with distribution planning and tactical analysis, by enabling the tracking of product flows and assets at a more granular level than previously available.

Today, Access Data provides enterprise data management and reporting solutions for asset managers representing more than 90% of long-term mutual fund assets, as well as 95% of assets in the growing ETF space. Strategic Insight provides business intelligence to firms managing about 90% of U.S. mutual fund industry assets through a linked suite of Simfund databases, in depth studies, and on-demand research.

"The combined expertise and breadth of data of Access Data and Strategic Insight is being translated into integrated offerings that will enable clients to focus their resources on the right distributors and products, and evaluate product market share across all sales channels," said [Dan Cwenar](#), President, Access Data. "This deeper level of transparency and insight will help drive strategic decisions and create additional avenues to capture growth well beyond what is available today."

"The information needs and demands of the mutual fund marketplace are growing and evolving rapidly," said [Avi Nachmany](#), Executive Vice President and Director of Research at Strategic Insight. "Our partnership with Access Data benefits from both organizations' leadership in providing actionable competitive intelligence. The added layers of transparency produced by our partnership will help firms to identify profitable and growing distribution opportunities, as well as vulnerable relationships. Such transparency, not available previously, has become essential due to an increasingly wide-ranging and complex distribution landscape."

The partnership comes at an important time for mutual fund firms. With the rise of registered investment advisors and independent broker-dealers, fund managers are targeting sales opportunities in a broader array of distribution channels than ever before. And, as a recent McKinsey & Co. study concluded, net cash flows have been found to be the primary driver of growth for mutual fund firms.⁽¹⁾ These trends mean that it is increasingly crucial for asset managers to understand net new flows by distribution channel and financial intermediary.

(1) McKinsey, "Growth in a Time of Uncertainty – The Asset Management Industry in 2015"

About Broadridge

Broadridge is a technology service company focused on global capital markets. Broadridge is the market leader enabling secure and accurate processing of information for communications and securities transactions among issuers, investors and financial intermediaries. Broadridge builds the infrastructure that underpins proxy services for over 90% of public companies and mutual funds in North America; processes more than \$4 trillion in fixed income and equity trades per day; and saves companies billions annually through its technology solutions. For more information about Broadridge, please visit www.broadridge.com.

About Access Data

Access Data Corp., a Broadridge Company is a leader in enterprise data management, analysis and reporting for the financial services industry. Today, leading asset management firms and financial intermediaries utilize Access Data's proprietary technology and services to gain visibility into how sales and assets are generated and address a myriad of challenges in distribution, compensation management and compliance and risk management. Access Data's flagship product, Access Data SalesVision® provides comprehensive storage and analysis solutions, delivering web-based reporting as Software as a Service. For, more information about Access Data, please visit, www.accessdc.com

About Strategic Insight

Strategic Insight, founded in 1986, is a leading research firm for the mutual fund and wealth management industry, providing clients with in-depth studies, consultation, and electronic decision support systems. Strategic Insight assists more than 250 firms worldwide, including the largest U.S. mutual fund companies. Visit us at www.SIonline.com. SI's parent, Asset International, is a privately held provider of information and technology to global pension funds, asset managers, financial advisers, banking service providers, and other financial institutions in the private and public sector. The company has offices in New York, Boston, Hong Kong, London, Melbourne and Stamford, CT. For additional information, visit www.AssetInternational.com.

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