

# Axiomatic Data Launches Plan Intelligence, the First Comprehensive Database for Analyzing 401(k) Fund Lineups

*New platform enables asset managers, alternative investment firms, and RIAs to track fund placements, market share, and lineup changes at individual plan level*

NEW YORK, NY, UNITED STATES, May 13, 2026 /EINPresswire.com/ -- Axiomatic Data, the Form



401(k) plan data has been difficult to analyze because its been inconsistent, trapped in PDFs, and complicated by nuanced differences. This is the first database to solve these challenges."

*Lory Cohen*

5500 data company, today announced the launch of Axiomatic Plan Intelligence, a first-of-its-kind database that transforms Schedule H (Schedule of Assets Held) data from Form 5500 filings into actionable competitive intelligence for the defined contribution market.

Axiomatic Plan Intelligence provides comprehensive coverage of the U.S. 401(k) market, including:

- 60,000 active 401(k) plans
- 55,000 companies
- 450 asset managers

- 6,000+ funds
- Three years of historical data

The platform enables users to analyze fund-level holdings, track manager market share trends, identify target date fund provider switches, monitor CCT conversions, and detect year-over-year lineup changes across the entire DC market.

"401(k) plan data has been notoriously difficult to analyze because it has been trapped in PDFs, riddled with inconsistencies, and complicated by nuanced differences—like distinguishing between mutual funds and common collective trusts that represent the same underlying investment strategy," said Lory Cohen, Partner at Axiomatic Data. "Axiomatic Plan Intelligence is the first database where all these challenges have been solved. We've normalized 6500 funds to standard fund names, enabling users to track strategies across vehicle types and see the true competitive landscape for the first time."

**\*\*Use Cases\*\***

Axiomatic Plan Intelligence serves three primary markets:

**Asset Manager Competitive Intelligence:** Traditional asset managers can track their fund placements across the DC market, monitor competitor positioning, identify plans where they've gained or lost share, and discover opportunities based on lineup composition and historical behavior.

**Alternative Asset Manager Targeting:** Alternative investment managers entering the DC market can identify plans that have demonstrated openness to non-traditional investments, track the adoption of alternatives across the market, and build targeted prospect lists based on actual plan behavior.

**RIA Client Intelligence:** Registered investment advisors can better understand their clients' 401(k) investment options, benchmark plan lineups against peers, and identify opportunities to provide more informed guidance.

**Availability**

Axiomatic Plan Intelligence is available now. To request a demo and trial access, visit [www.axiomaticdata.com](http://www.axiomaticdata.com) or contact [info@axiomaticdata.com](mailto:info@axiomaticdata.com).

**About Axiomatic Data**

Axiomatic Data, the Form 5500 data company, transforms complex regulatory filings into structured, analyzable data for the retirement plan industry and broader analytics use cases. Based in New York, Axiomatic Data serves asset managers, financial advisors, and institutional investors with comprehensive data solutions. For more information, visit [www.axiomaticdata.com](http://www.axiomaticdata.com).

###

Media Contact:  
[info@axiomaticdata.com](mailto:info@axiomaticdata.com)  
[www.axiomaticdata.com](http://www.axiomaticdata.com)

Lory Cohen  
Axiomatic Data  
[info@axiomaticdata.com](mailto:info@axiomaticdata.com)

Visit us on social media:

[LinkedIn](#)

[X](#)

---

This press release can be viewed online at: <https://www.einpresswire.com/article/912235628>

EIN Presswire's priority is source transparency. We do not allow opaque clients, and our editors try to be careful about weeding out false and misleading content. As a user, if you see something we have missed, please do bring it to our attention. Your help is welcome. EIN Presswire, Everyone's Internet News Presswire™, tries to define some of the boundaries that are reasonable in today's world. Please see our Editorial Guidelines for more information.

© 1995-2026 Newsmatics Inc. All Right Reserved.