

With Intelligence Launches Investor Analytics

Builds on industry's leading database of institutional investors to align fundraising goals with institutional investor intentions and performance benchmarks

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Thomas Crutchley, With Intelligence Head of Product Strategy

S&P Global, the leading source of private markets data, insights and analytics, today announced the launch of Investor Analytics. The new research and analytics capability draws on With Intelligence's industry-leading database of institutional investor intentions, mandates, and performance benchmarks to give fund managers a one-stop fundraising resource to quickly and effectively identify investors who are most closely aligned with their investment strategies.

“Establishing new relationships between fund managers and investors is ultimately an exercise in opportunistic alignment; firms typically have a clear investment strategy,

sector focus, and time horizon, and when those priorities align with investors' targets, strong relationships are formed,” said Thomas Crutchley, With Intelligence Head of Product Strategy. “However, with the field of firms and portfolio investments expanding rapidly, and institutional investor strategies and holdings not typically broadcast publicly, it can be challenging for fund managers to find the optimal investors at the exact right time. Our research and analytics capability pairs our deep insight and data on investor intentions, new investor mandates, and performance benchmarks with a fund's own proprietary data to identify investors who are most likely to support new fundraising.”

Drawing on the With Intelligence database, Investor Analytics allows fund managers to enter details of their fund strategy and identify investors that potentially align with their selected fund criteria, such as the following:

- **Investor allocation intentions:** With Intelligence maintains the industry's leading database of institutional investor intentions and preferences, allowing a detailed segmentation of investor interest in specific strategies, sectors, and risk profiles.
- **Mandates:** With Intelligence tracks more than 117,000 investor mandates in real-time, including both live and closed institutional searches, total capital values, asset classes, and

selection timelines.

- **Investments:** The With Intelligence database also analyzes current investment portfolios across the institutional marketplace, making it possible to identify opportunities in existing strategies.
- **Manager on watch:** Tracking both active fund managers and management consultants, the platform makes it possible to instantly identify the key decision makers leading overall investment strategy.
- **Asset allocation:** With Intelligence delivers a detailed assessment of where existing investor assets are allocated to help fund managers determine whether there may be opportunities for growth in a particular slice of the market.
- **Bottom quartile funds:** With Intelligence makes it possible for fund managers to determine whether current institutional investments in specific sectors are over- or under-performing key benchmarks, creating an opportunity to reach out to managers currently invested in bottom quartile funds to consider making a move.

Each of these criteria is weighed against the fund manager's proprietary investment strategy to produce a simple score measuring overall potential to invest, along with the ability to drill down into each metric for more detail and critical intelligence. Together, these insights make it possible for fund managers to quickly create a target list of potential investors based on data-driven insights to help assess potential strategic fit and make more informed decisions. Importantly, the new feature replaces hours of cumbersome research across multiple different platforms and user interfaces with a single, seamless experience.

Once they've identified potential target investors, fund managers are responsible for determining whether, when, and how they may contact any investor and for complying with all applicable marketing, pre-marketing, private placement and other regulatory requirements, including any requirement for a pre-existing substantive relationship or exemption.

For more information on Investor Analytics, or to schedule a demo, please visit <https://www.withintelligence.com/solutions/investor-analytics/>.

About With Intelligence

With Intelligence is part of S&P Global, delivering end-to-end coverage across the alternatives marketplace. With Intelligence's proprietary data spans a uniquely comprehensive view of private market activity and relationships, including robust, direct-from-investor allocation data and benchmarking capabilities. We are here to help you leverage comprehensive, connected and actionable private markets intelligence.

For more information on With Intelligence, or to arrange a demo or request a trial, please visit

www.withintelligence.com

About S&P Global

S&P Global (NYSE: SPGI) enables businesses, governments, and individuals with trusted data, expertise and technology to make decisions with conviction. We are Advancing Essential Intelligence through world-leading benchmarks, data, and insights that customers need in order to plan confidently, act decisively, and thrive in a rapidly changing global landscape.

From helping our customers assess new investments across the capital and commodities markets to navigating the energy expansion, acceleration of artificial intelligence, and evolution of public and private markets, we enable the world's leading organizations to unlock opportunities, solve challenges, and plan for tomorrow – today. Learn more at www.spglobal.com.

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