

FIDUCIARY RESEARCH

CUSTOM RESEARCH FOR INVESTMENT PROFESSIONALS AND FIDUCIARIES

INDEPENDENT RESEARCH TO HELP YOU MAKE INFORMED DECISIONS

With Lipper's Fiduciary Research, you get independent, objective research tailored to your needs—what you want and when you need it.

Fiduciaries in the Financial Services industry face greater challenges than ever in today's global markets. You need a place to turn for accurate and timely custom investment company and retirement market research. Lipper's Fiduciary Research provides you with comprehensive industry intelligence from a trusted, unbiased source.

Our dedicated analysts help you leverage Lipper's world-class investment analytics to provide market intelligence for your business. From performance analysis to retirement platform product review, our research content is designed to help provide answers to some of the most difficult questions facing today's investment industry.

A TRUSTED PARTNER FOR YOUR RESEARCH NEEDS

The experts in our Fiduciary Research team combine Lipper's institutional quality investment and fund analysis with years of knowledge and expertise to provide investment professionals and fiduciaries with the in-depth examination and answers they need.

Investment company boards, investment advisors, legal counsel, consultants, and others work closely with and trust the Fiduciary Services team with sensitive information and have long-standing, trusting business relationships with our team.

RESEARCH AND ANALYTICS TO FIT YOUR NEEDS

- Customized expense universe analysis
- Customized expense peer group review
- Comprehensive investment risk, return, and benchmark analysis
- Retirement platform product analysis
- Target date fund analysis — pre- and post-retirement glidepaths
- Portfolio subadvisor analysis
- Performance attribution analysis
- Trends in retirement plan investment products
- Unbiased investment company insight
- Opportunities available for white-labeled research

Lipper's Fiduciary Services team has always prided itself on providing exemplary customer service and our research is no exception. We're here when you need us with fast, thorough, and accurate information using Lipper's institutional quality databases to help provide you with the information you need now.

OTHER FIDUCIARY RESEARCH PRODUCTS

- Industry updates—news from around the industry
- Access to our monthly research series—through continuous interaction with many leading asset managers, we are keenly aware of the topics that affect you most.
- Annual fund industry fee and expense analysis
- Annual Investment Company Profitability Report

ABOUT LIPPER

Lipper provides independent insight to asset managers and institutional investors on global collective investments, including mutual funds, retirement funds, hedge funds, and fund fees & expenses. Lipper offers premium-quality data, fund ratings, analytical tools, and global commentary through specialized product offerings. Bolstered by the resources and knowledge of our parent company Thomson Reuters, Lipper provides unparalleled expertise and insight to the funds industry. www.lipperweb.com.

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