

with. HFM

Hedge fund intelligence and analysis

**Comprehensive hedge fund information
and performance metrics**

With HFM helps you with
fundraising, allocation decisions
and growing your business

with.
Intelligence

What is With HFM?

With HFM is a new combination of information about hedge funds. It gives you comprehensive data, news, performance metrics and our own exclusive commentary and our analysts' perspectives.

It blends information from HFM and EurekaHedge, both previously standalone products, and both previously acquired by With Intelligence. With HFM brings these rich data sources together for the first time.

With HFM is delivered via our contemporary new interface with its filtering, analysis and personalization options so you can search across our data sets, find and analyze the information you need quickly and tailor the content to your interests.

How it can help you

We help you find answers to the difficult questions. With HFM helps you with fund raising, allocation decisions and growing your business. We can help you:

-  Monitor people moves, asset allocations, pending searches, mandates (RFPs)
-  Get strategic, actionable intelligence on existing and new prospects
-  Benchmark funds against peers so you know you're allocating to the best managers for your portfolio
-  Create league tables that highlight fund performance
-  Be the first to understand new funds launching, and potential fund launches
-  Identify and target your top priority investors in a region

What information does With HFM contain?

We deliver rich data on investors, performance data on funds including indices, mandates (RFPs), plus a rich source of proprietary intelligence on the industry, and its people – investors, managers and consultants. We also have an exclusive, highly valuable dataset of investors' intentions and preferences.

The information is simple to tailor to your interests, helping you isolate the information that's most valuable to you. Our data empowers you to successfully target the right prospects, have conversations with the right investors and make the right investment decisions.



Monitor

Your continuous stream of fresh, curated intelligence

Your Now feed delivers intelligence that's been gathered by our researchers, reporters, and data analysts. It's easy to personalize and create your own stream covering the topics, funds, regions and that are most important to you.

As well as news stories and research reports, the Now feed includes Signals, our snippets of intelligence that alert you to a new opportunity or to competitor information such as fund closures, launches and people moves.

Your daily email round up

Your daily email alerts you to opportunities and key news stories or Signals, so you stay informed without even accessing the product.



Tasks

Search and analysis functionality that helps you work more efficiently

Profiles

Our profiles include:

- **Investor Profiles** - a history of investment activities and strategy preferences to help you explore new business opportunities
- **Fund Profiles** – details of product and distribution strategies to help you find alignment and select the right fund
- **Manager Profiles** – details of AuM, location and performance so you can keep track of the market
- **Consultant Profiles** – details of a consultant's expertise, investor relationships plus names, roles, locations and contact details of individuals.



Mandates

We include information from mandates (RFPs) and official listings that inform the market of money to be invested, how it will be invested, and the process that will be used to select the appropriate funds, giving you relevant, timely and concrete alerts, and early access to opportunities.



Indices

We offer a range of indices, including the renowned Eureka hedge indices, so you can benchmark performance against a group of funds, and understand market positions. You can also create your own indices to highlight performance in tailored league tables.

We've highlighted dynamic fund indices using a new banner that shows data in monthly, year-to-date, past year and annualised return formats. These are updated as funds report performance, segmented by strategy and sub-strategy.

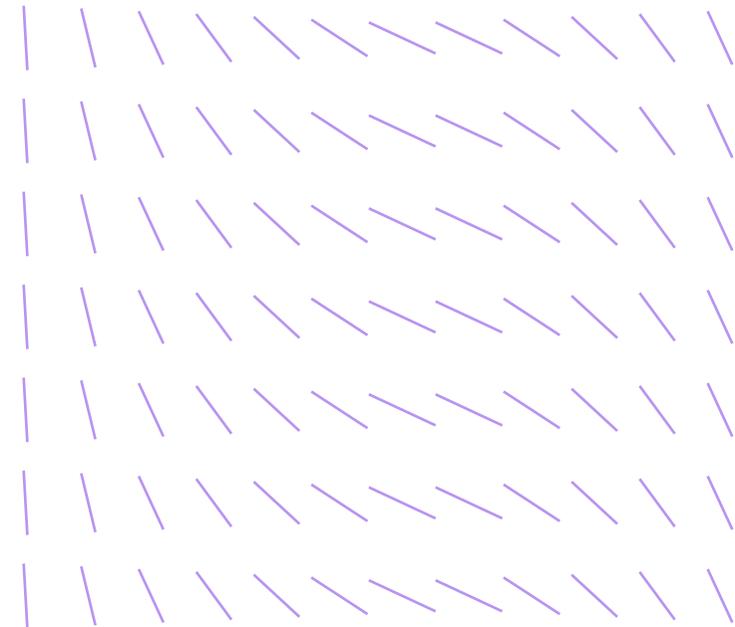
The combination of HFM and Eureka hedge indices results in a greater number of constituent funds for a more comprehensive view.



Reports

Reports include:

- Future fund launches
- Fundraising opportunities
- Hedge Fund Performance Report
- Investor intentions



Intentions and preferences

Investor intentions and preferences show you who is planning to allocate where and why, and these are clearly visible within the investor profiles. This information helps you to quickly assess potential alignment and identify opportunities. We gather this via direct contact and proprietary research.



Intentions

These are the strategic intentions for the upcoming year, an example is:

An investor is planning to commit \$500 to hedge fund strategies next year. Specifically:

- **Global:** long/short equities, macro
- **North America:** long/short equities, event driven, macro
- **Europe:** long/short equities, macro, CTA
- **APAC:** will not invest in APAC
- **Target investment amount per manager:** \$50-100m to maintain a diversified portfolio
- **Additional info:** seeking a director of investments to lead on investments across alternatives



Preferences

These are the investor's requirements for its managers to apply during their selection process. Examples of selection criteria include:

- Strategy requirements: managers running a single strategy
 - Minimum fund AuM required: 250m USD
 - Maximum fund AuM required: 2b USD
 - Minimum manager tenure: five years
- And ESG information can also be included, such as:
- Requires managers to have ESG strategies
 - Invests in impact strategies
 - Is barred from investing in the following sectors: Tobacco, abortifacients, defense and weapons, stem cells, pornography

Our coverage

Our data is fresh, exclusive and spans the investment landscape. Our focus is on quality and providing rich and valuable information on the funds and opportunities that matter to you.

8,500+ 

investors

8,540+ 

managers

7,500 

mandates

500 

consultants

37,000+ 

funds

How we source our data

We complement data in the public domain with our detailed proprietary research.

Sources include company websites, LinkedIn and other social media, annual reports, regulatory filings, press releases and news coverage, desktop research, freedom of information requests and earnings calls.

Our proprietary data is harvested straight from the industry and enriched via interviews, questionnaires, our own bespoke events and our deep industry relationship including proactive outreach to our industry connections, intelligence that's submitted to us directly, questionnaires, our own freedom of information requests and the intentions and preferences that investors share with us about their future investment plans.

Working with the data

Our interface is modern, easy to use and very flexible. You can integrate our rich dataset right into your workflow and use it to work more efficiently, make decisions and create actions.



Searching

We've designed the platform to be easy to use, so it's simple to create even complex searches. We offer a huge range of filters – 214 in total – that you can combine to find very specific traits and save your searches for repeat use.



Analyzing

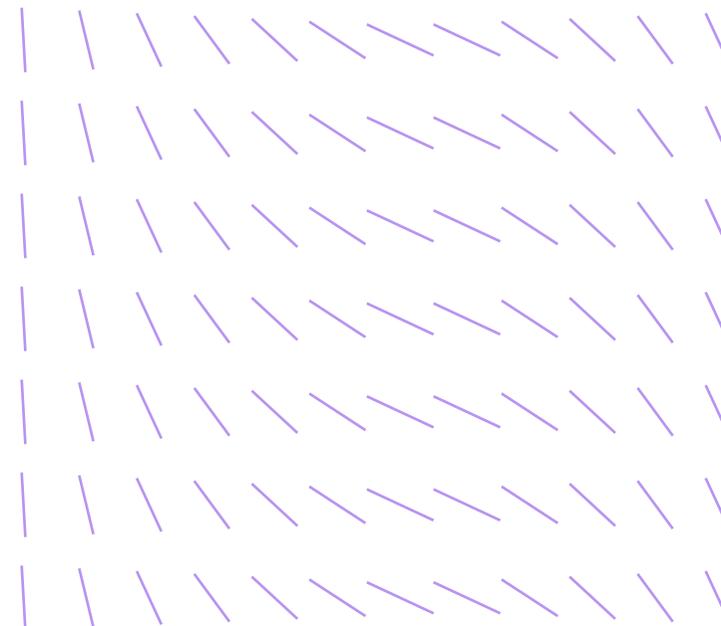
A range of tools help you analyze and act. They include:

- **A fund comparison tool** for extensive analysis of an unlimited number of funds and indices
- **Visualization options:** see fund data and statistics graphically
- Side-by-side **profile comparisons**
- Fund ranking for peer analysis so you can create your own league tables.
- **Performance-based filters** so you can track and benchmark fund performance, including:
 - Previous and current year returns
 - Annualized returns
 - Sharpe ratio
 - Max drawdown
 - Annualized standard deviation
 - Worst monthly returns



Exporting the data

You can easily download the information you need to your own systems in CSV or Excel format for further analysis. An Export preview is also available to give you more transparency, and certainty around your exports.



Tailoring With HFM for you

One of the key benefits of With HFM is how accurately you can personalize it to your priorities and interests, incorporate research into your workflow, and ultimately find the best opportunities and make the best decisions. Options include:

- Your curated Now feed of news and intelligence – Signals all aligned to your interests for tailored monitoring
- Saved list formats and layouts that contain the information that's most important to you
- Extensive filtering options for highly specific searches that you can save
- Flexible analysis options for tailored peer analyses, charting, ranking and league table creation



Helping investors

Track and benchmark fund performance and indices so you can allocate effectively.



Helping service providers

Identify, and qualify, timely opportunities via the Now feed and find the most relevant prospects to contact in our manager database.



Helping asset managers

Identify new asset raising opportunities and track investor sentiment. Use our performance data and indices to benchmark your fund against peers to help you position your fund advantageously.

Also from With Intelligence

We organize and host summits and awards across the globe which are designed for and attended by leaders in the hedge fund industry. They're the ideal opportunity to make connections with your peers and gather further information on what is happening within the hedge fund industry.

Our flagship events include:

- HFM Asian Services and Performance Awards, Singapore
- EuroHedge Awards, London, UK
- Pension Bridge Hedge, Zurich, Switzerland
- HFM Asian Operational Leaders Summit, Hong Kong, China
- HFM Billion Dollar Club Summit, Long Island, US
- HFM European Operational Leaders Summit, Hertfordshire, UK
- HFM European Performance Awards, London, UK
- HFM US Performance Awards, New York, US

About With Intelligence

We're a leading provider of data, intelligence and connections to the global asset management industry. Our investment intelligence supports allocating decisions, fund-raising and business development.

Our global team includes data scientists, analysts, reporters and journalists, technologists, developers and industry experts – all obsessed with revealing the bigger picture on the asset management industry.

We deliver a unique blend of data that includes profiles, fund information, performance metrics and our valuable analyst perspectives.

We're here to help you connect with the right people, the right intelligence and the right opportunities.

Free trial

Access With HFM to see how it can benefit you, help you with your business challenges and complement your workflows.

To request a trial please get in touch

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🌐 withintelligence.com