

THOMSON REUTERS LIPPER INVESTMENT PROFILES

HIGH-QUALITY, COST-EFFECTIVE SOLUTION FOR SHOWCASING FUND PERFORMANCE

Fund solutions that demand attention

Investment Profiles are one of the most visible touch points of your brand. Thomson Reuters Lipper offers a faster, more accurate and cost-effective way to produce fund and ETF Profile Reports for investors, retirement plan participants, and advisors. Our professionally designed Investment Profiles offer a distinctive solution for communicating performance. We take care of the entire process from acquiring data directly from the source to checking accuracy and delivering fully branded reports.

EFFECTIVE AND EFFICIENT PUBLISHING SOLUTION

Thomson Reuters Lipper Investment Profiles offer your clients and prospects a complete view of your fund with an easily accessible report featuring valuable Lipper analytics, indices and averages, portfolio data, expenses, and performance information.

Save Time and Money

Outsourcing the production of your periodic reporting to Lipper can relieve the pressure on your internal resources and provide substantial cost savings. Achieve cost efficiency without sacrificing quality with our dependable print- and Web-ready reports.

Quickly reach clients and prospects

Lipper has created an automated, streamlined process to produce your Investment Profiles. Your clients will always receive the most current information available in Lipper's expansive fund database.

Provide local language capabilities

Lipper Investment Profiles are available in several languages, including English, French and Spanish, ensuring that information and analysis are relevant to local markets.

Reliable, efficient production process

Lipper generates thousands of custom reports for clients every month. We have earned the trust of top-tier firms and we have the ability to scale to meet client needs. Our production processes are time-tested so you can be assured of consistent and efficient delivery.

Outstanding Customer Service

Lipper has a dedicated team who will work closely with you to design and produce polished report templates that meet your content and branding requirements.

INVESTMENT PROFILES

Standard and Custom Lipper Investment Profile sheets provide an effective alternative to in-house report generation.

Custom Investment Profiles

Our custom solution can be tailored to provide the information and analysis you need in the format you require. The reports can be adapted to incorporate branding elements including corporate logos, colors, layout and typeface. Lipper also has the ability to include third-party images and data into the Investment Profiles. With our custom solutions, you can distribute high-quality, reliable analysis with your corporate branding and selected data.

Standard Investment Profiles

Our standard solution is presented in a clear and concise format with your corporate logo and up to a 500-character disclosure statement. The standard layout offers a popular selection of Lipper content including:

- Lipper indices and averages
- Investment objectives
- Fees and expenses data
- Performance analysis
- Risk evaluation
- Top holdings
- Lipper Leaders fund ratings
- Lipper calculated portfolio allocations

Lipper offers a 1-page and 2-page solution. Our 2-page Investment Profiles feature in-depth analysis and content appropriate for institutional investors. Our Investment Profiles are available in PDF and HTML formats for easy distribution and integration into electronic communications and Web platforms.

ABOUT THOMSON REUTERS LIPPER

Thomson Reuters Lipper provides independent insight to asset managers and institutional investors on global collective investments, including mutual funds, retirement funds, hedge funds, and fund fees and expenses. Lipper offers premium quality data, fund ratings, analytical tools, and global commentary through specialized product offerings. Trusted by investment professionals for more than 40 years, Lipper provides unparalleled expertise and insight to the funds industry.

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