FundGUARD ™
Growing Assets and Reducing Redemptions

ANGOSS

Industry competition, high redemption rates, and continuing pressure to reduce management expense ratios make growing and retaining assets under management a pressing challenge for mutual fund managers. With an uncertain market outlook impacting fund performance, it has never been more important for fund managers to target their activities effectively with an eye towards increasing sales while reducing redemption risk.

FundGUARD™ provides the advanced analytics capability needed to increase assets, reduce redemption risk, and align sales and marketing initiatives with your organization's growth strategies.

FundGUARD helps your organization:

Discover - Information about your customers through data driven analysis of your channels and leverage the data you already have for competitive advantage

Predict - Your best sales opportunities and highest redemption risks six times better than your current process. Result - increased revenue.

Act - To empower your sales channels with information to allow automated, predictive sales and redemption targeting, and increased revenue.

Predictive analytics and data analysis capabilities have been widely used in the retail banking and consumer credit card industries to drive revenue growth and reduce risk for over a decade.

Leading mutual fund and wealth management organizations now realize that one of the critical success factors moving forward is how effective their sales and marketing organizations leverage their data to grow and remain competitive. Turning the immense amounts of data captured by mutual fund and wealth management organizations into actionable business results is what FundGUARD is all about.

> "Predictive analytics solutions generate an average return on investment of 145%."
>
> IDC (October, 2003)

> "Predictive analytics makes it possible to tie our advisor-centered business strategy to every customer interaction, whether it's in our call center or through the financial advisors who sell our products. This kind of consistent, enterprise-wide customer insight and service is truly the next level of CRM."
>
> Stephen Elioff
> Senior Vice President
> AGF Management Ltd.

Imagine if you could predict future sales and redemptions across your distribution network and at the individual advisor level? How would this capability affect your firm's ability to:

• Increase sales and retain clients

• Discover and deliver better-qualified presales and redemption leads

• Prioritize and align better more profitable sales coverage

• Capture, resolve and reverse redemptions

• Create and deliver targeted messages to the right individual customers

FundGUARD combines market proven analytical tools, methodologies and best practices, developed over a decade of providing advanced data mining and predictive analytics software and services to clients across major financial services organizations.

What is FundGUARD?

The interactions and activities of your sales force results in a wealth of data that can be transformed into a strategic advantage. Predicting product preferences and purchase redemption habits - and crafting the most relevant marketing messages around this information - requires a carefully orchestrated mix of intuition and an analytical framework that supports fact-based decision-making. Without an analytical structure in place, even the savviest sales or marketer will have difficulty analyzing all of the complex information they may be gathering.

For many Mutual Fund companies, data is largely ignored, or provides historical analysis that cannot be used to drive future business performance. FundGUARD helps your organization move beyond tracking and assessing results historically and puts you on the path to capitalizing on data to predict the future and to understand and act on the value and behaviors of each advisor or customer. Predictive analytics, such as those techniques employed by FundGUARD, are needed to provide a clear picture of what is going to happen in order to take the most effective action.

FundGUARD is a powerful, data driven analysis solution that provides actionable insight and tangible business benefits for fund marketers, sales managers and their sales force. It is based on key performance indicator multi-dimensional customer segments, predictive models and on-going customer scores and support. FundGUARD will help your organization answer the following important questions about your business:

• Is your current segmentation system effective? How can you improve it?

• Who are your best advisors or clients...and why?

• Which advisors or clients are most at risk to redeem and why?

• What will your advisors and clients buy next...and when?

• How can you optimize your sales resources and marketing spend to maximize asset growth and client retention, while minimizing redemption risk?

Move your sales channel towards proactive targeting strategies that are 6 times better than your current system.

Key Benefits of FundGUARD?

FundGUARD helps accelerate asset acquisition, reduce redemption risk, improve client retention rates, and better align sales and marketing costs with related performance objectives, by providing proactive instead of re-active sales and marketing strategies as well as:

• Automated, data driven segmentation and segment shift tracking providing in-depth analysis for management

• Historical and predictive analysis and forecasting of advisor/client actions

• Predictive, prioritized list generation for redemption risk and best sales opportunities

• Convenient dashboard based analysis, reporting and monitoring tools

• Easy assessment of sales and marketing resources aligned with opportunities and risks

• Streamlined integration with sales force automation, CRM and Reporting systems.

With FundGUARD, business professionals finally have the tools to discover sales opportunities and flag redemption risks, so they can do what they do best—drive sales growth.