

Distribution Management Solution



Secure Access – Anytime, Anywhere – to Critical Industry Data and Powerful Analytical Tools.

For broker dealers and asset managers, access to industry data and business intelligence, such as asset, sales and net flow information on mutual fund, separately managed account (SMA) and exchange-traded fund (ETF) products, is critical to making informed business decisions. BNY Mellon Intermediary Analytics offers an intelligent, accurate way to help you craft action-oriented strategies, execute with better precision, and drive your business forward.

Intermediary Analytics by the Numbers



Asset coverage of more than \$3 trillion is represented on our platform*



35 direct data sponsors comprising wirehouse, national, independent and regional broker dealer feeds



Over 20 thousand reports distributed monthly and over 5 thousand daily reports distributed



More than 175 asset managers utilize the solution



More than 10 years experience providing distribution intelligence

To Make the Best Decisions, You Need the Best Data

Our web-based Distribution Management Solution (DMS) transforms assets under management (AUM) and asset flow data, received *directly* from our broker dealer sponsors, into actionable dashboards and reports. Our unique and comprehensive datasets will help you answer key questions and execute with confidence in today's competitive landscape.

Manually gathering and analyzing data takes time and resources away from targeting opportunities and driving sales. DMS automates this data aggregation and enables you to more quickly and efficiently utilize data, supporting you in the following ways:

Broker Dealers: Turn Challenges into Opportunity

RELATIONSHIP MANAGEMENT

- Support in delivering data to asset management partner firms and a dedicated client service model to support your data related inquiries
- Develop custom analysis and business performance measurements
- Automate the process of creating partner assessment scorecards

SALES AND FIELD MANAGEMENT

- Provide monthly scorecards to field leadership that highlights critical metrics and KPIs
- Interact with field specialists to identify potential areas of growth
- Maximize interactions with asset managers and field leadership

PRODUCT AND PLATFORM MANAGEMENT

- Analyze unique industry trends across mutual funds, exchange-traded funds and separately managed accounts down to the financial advisor level
- Understand an asset manager's penetration by platform and product as well as quality of products offered
- Improve training by targeting advisors using a specific platform or product

PRODUCT OPERATIONS

- Manage end to end delivery of analytics, covering everything from logistics to client service oversight
- Support account level reporting to third party asset managers

*As of December 31, 2017



Asset Managers: Spend Less Time Gathering Data and More Time Executing Initiatives

FIELD SALES AND NATIONAL ACCOUNTS

- Identify new sales opportunities by territory and branch, with competitive insights
- Maximize your interactions to platform executives at specific broker-dealers
- Isolate firm discretionary from rep driven flows to better define opportunity by investment style
- Evaluate sales effectiveness and pinpoint potential areas of growth for team members and enhance your external and internal wholesaler efforts

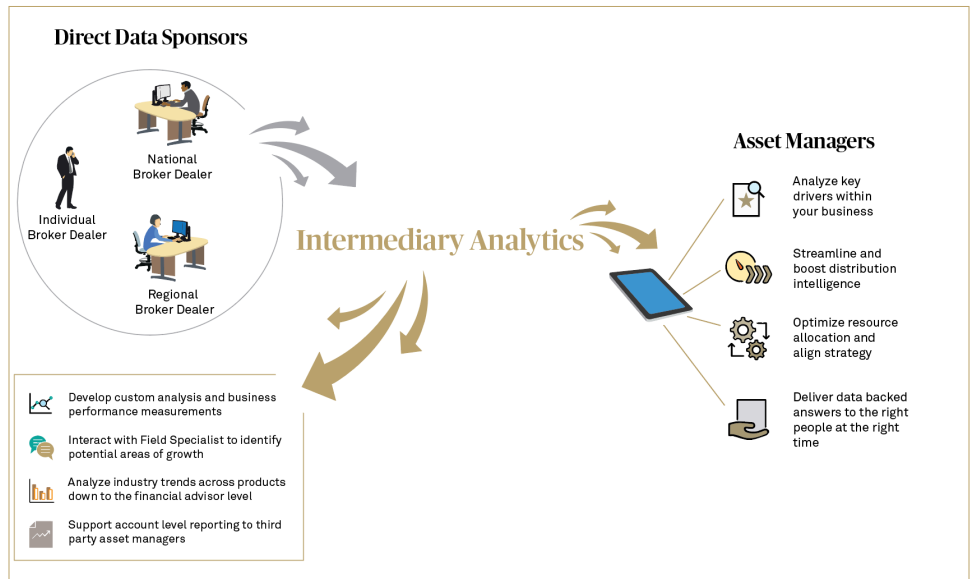
PRODUCT AND MARKETING

- Evaluate the mix of mutual funds, exchange-traded funds and separately managed accounts by asset class and investment style
- Define target audience more effectively
- Create a more comprehensive narrative by leveraging such a unique data set and insights made available to you

SALES STRATEGY

- Deliver monthly data extracts to easily integrate with other internal data sources
- Provide insight into how to leverage data to maximize sales

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FOR MORE INFORMATION

To learn more about BNY Mellon Intermediary Analytics and our Distribution Management Solution, please visit bnymellon.com.



bnymellon.com

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