FINANCIAL CLARITY

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Product Factsheet

Enhancing business performance

For over 30 years, Matrix Solutions has stood at the forefront of delivering database management services to firms in the UK financial services sector.

Our suite of data analytics and industry insight solutions empower companies to grow their business through optimization of their sales and distribution strategies.

Financial Clarity Overview

Our flagship analytical platform—Financial Clarity—integrates the expansive Matrix Solutions' datasets and industry expertise into a single, one-stop shop for market intelligence on financial intermediaries operating in the UK market. Key features of Financial Clarity include:

- **Integrated Proprietary and Exclusive Datasets**

  Powering Financial Clarity's analytical engine is our exclusive data on transaction volumes, collected from individual product providers (fund management companies, DFMs, life & pension providers and platforms) and distribution platforms. Collectively, our data-sharers extend our coverage to an industry-leading 90% of intermediated sales. Financial Clarity also includes access to the Matrix Financial Intermediary Database (MFID) – the UK's most comprehensive, GDPR compliant, financial intermediary database incorporates the most current information at individual outlet and FCA-registered advisor levels.

- **Simple and Secure Web-based Platform**

  The Financial Clarity visual and user-friendly interface sits directly on top of data feeds containing the latest submissions, works with any web browser and requires no additional software set-up or IT support. Our pre-assembled, highly intuitive dashboards help users quickly glean analytical insights into their product sales relative to market benchmarks, and offer an analytical shortcut to examining data at varying levels of detail from the macro-perspective of the overall market to the micro-view of the detailed local distribution outlet.

- **CRM Integration**

  We have worked with the top firms to develop our market leading Single Intermediary View ("SIV") solution feeding directly into CRMs. Backed by over 10 years' experience integrating client and Financial Clarity datasets, SIV allows clients to maximise engagement and marketing strategies. Additionally, based on client demand, we developed a complete, Salesforce integration package through our Total Clarity service.

Financial Clarity Key Benefits

Financial Clarity offers product manufacturers a data-driven tool to benchmark and optimize the efficacy of their marketing and distribution strategies. Financial Clarity helps clients:

Drive New Business

Prioritize sales and marketing efforts by identifying new prospects based on sales volume or assets under management in a specific product, sector or region.

Deepen Relationships and Engagement

Easily assimilate client- and/or prospect-centric intelligence including product preferences, sectors, platforms, and growth patterns. Armed with a comprehensive set of firm, branch and individual insights, calibrate your service, offering, and communication strategies to meet their specific needs.

Optimize Sales Performance

Customize, monitor and evaluate key performance indicators to understand what sales and marketing efforts deliver against department, product, and corporate goals.

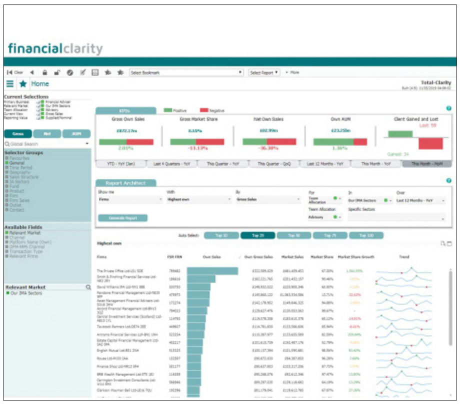
Monitor Emerging Trends

Quickly identify and react to signifi cant developments across the entire marketplace.

Power Growth with Financial Clarity Dashboards

Home Dashboard

Gain an immediate view of your sales and assets against KPIs. The Report Architect feature allows for streamlined identification of key opportunity and defensive targets.



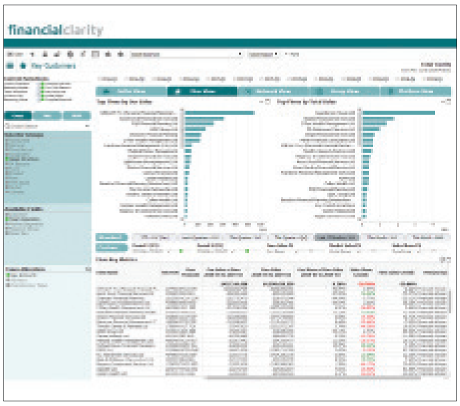
Home Dashboard

Key Customers Dashboard

Maximise performance by knowing where best to focus time and deploy resources. Easily identify customers requiring prompt attention, your largest accounts and intermediaries, as well as those primed for the most growth potential.

Pinpoint Dashboard

The mobile-friendly Pinpoint dashboard allows those on the move to plan optimum sales visits and identify prospects via geographical searches for the most relevant intermediary. View results by product type, sales volume and wallet share accompanied by links to the most current contact and business profile information within Financial Clarity.



Key Customers Dashboard

Sales Team Performace Dashboard

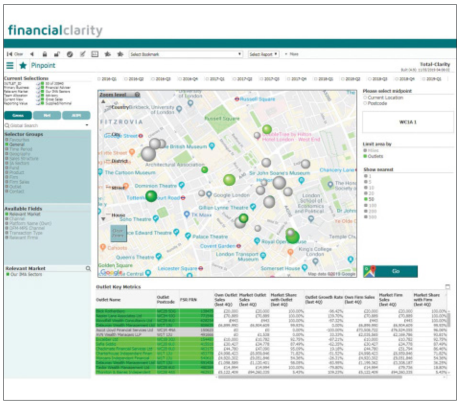
Providing an at-a-glance view of sales and sales team effectiveness and analysis, the Sales Performance dashboard generates automatically, is simple to use and updates regularly with the most current figures.

Account Analysis Dashboard

Provide the right service to your intermediaries with a deeper understanding and view of their sales at the outlet or aggregated firm level. Assess your sales against the wider market (through a specific intermediary) across relevant variables such as your own product by product analysis.

Lead Generation Dashboard

Using the Lead Generation dashboard, easily create contact lists including email, phone and mailing address to targets specific roles within an intermediary (either by controlled function or job title). Contact lists can easily be exported and/or sent to Salesforce from the click of a button.



PinPoint Dashboard

Corporate Performance Dashboard

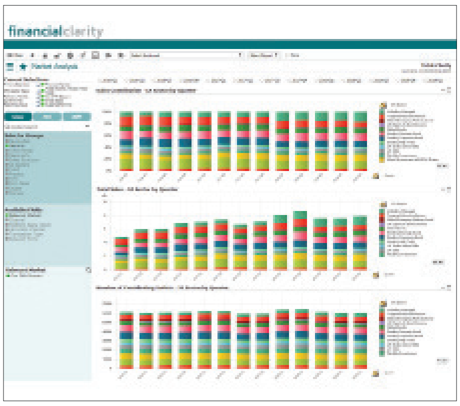
Analyse sales trends, sales growth relative to the market, changes in market share and how your sales mix differs from the market as a whole. Through this fully-customizable, at-a-glance lens of your current sales state, view details at an aggregate level or by specific products, intermediary types, or mapped to your own sales regions.

Product Analysis Dashboard

Analyse product sales across the entire product portfolio to identify areas for future investment or possible withdraw.

Market Analysis Dashboard

The Market Analysis dashboard allows you to assess the performance and breakdown of the entire market. Quickly identify and proactively address significant changes such as fast growing or declining products or changes in industry structure resulting from new regulation.



Market Analysis Dashboard

A Word From Our Clients

"In the past we were skeptical about market data aggregators, but we are now convinced that Financial Clarity gives us the edge we need to continue growing our market leading position. We look forward to using the transactional data available and profiling a range of new suitable adviser clients that suit our platform. Financial Clarity delivers clear and up-to-date dashboards of the key sales data my team require, to ensure that we generate continued and sustained growth."

Glen Sweet - Head of Sales | Transact

"Financial Clarity has been a formidable tool in understanding the advisory landscape in the UK. Intuitive and easy to use, it has become intrinsic to our adviser sales process. We particularly use the system for sales strategy and reporting. We are excited to see the addition of MPS and scorecard. A more bespoke and consultative service is the next stage in our relationship."

James Adams - Head of UK Adviser Sales | BlackRock

Financial Clarity provides an excellent view of a distributors recent fund purchasing habits, contact details and the opportunities afforded to our company. Additionally allows for management to establish templates that provide a view for management of the sales activity and opportunity by distributors and therefore assists greatly with
regional sales strategy in particular."

Mark Elliot - Head of Strategic Alliances | Franklin Templeton

MatrixSolutions

Contact Us

To arrange a further discussion or schedule an initial workshop, please contact the Matrix Client Services Team.

+44 (0)20 7074 1200

sales@issmarketintelligence.com

financial-clarity.com

Matrix Solutions
55 New Oxford Street
London
WC1A 1BS

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