IPREO

Investment Banks Investors Investor Relations

Capital Markets
Global Research Content

The most complete and accurate global institutional database on the market

The Industry Leader

Ipreo's global institutional database is the standard resource for anyone in the institutional securities game. Many firms have tried and failed to create and maintain accurate, internally-maintained databases of institutional money managers. Clean data is the life blood of a firm's ability to execute... on many levels - it touches every business unit, impacting your bottom line and how the market perceives you. Known for over a decade for offering the premier institutional equity dataset, Ipreo has added comprehensive global fixed-income content to further your success.

We have invested significantly in infrastructure and resources to support our global research, content and collection enterprise. As a result of the time and energy allocated to this effort, we are confident our clients are provided with market-leading content on global, multi-asset class Buy-side and Sell-side contacts and institutions. Our superior technology enables us to collect and deliver content with incredible responsiveness and flexibility, whether it be through off-the-shelf applications or custom data feeds.

By leveraging Ipreo's core content management competency and industry expertise, firms can effectively outsource a burdensome and costly effort, both in terms of technology and human resources, freeing up resources to focus on the moneymaking activities your institution excels at. At the same time, we provide a solution to a common yet costly business problem among investment banks: managing and maintaining clean, reliable, consistent information across the organization.

Data Quality - Ipreo has a large, carefully trained and managed staff of capital markets research analysts. This massive force exclusively manages, updates and grows our database. No company in the industry comes anywhere close to dedicating the same level of manpower and resources to content management. As a consequence, the quality and accuracy of the intelligence we deliver to our customers is unparalleled. Simply put, we are known in the marketplace as the most highly accurate, timely and well-scrubbed provider.

Expertise - Ipreo has compiled a first-class team of language speakers with country specialties to track market movements, the legislative environment, and local press. Our global collection effort is based, with appropriate local market adaptations, on our time-proven research methodology, which is known to produce the best details available to the market.

Global Brand - Having offices worldwide, Ipreo's research team is part of a global effort involving hundreds of staff members in the US, Europe, Africa and Asia. Ipreo leverages these global resources to improve quality, accuracy, and breadth of content to an even greater degree.

About Ipreo

The marriage of deep industry expertise and dynamic innovation, Ipreo brings market-leading intelligence, robust technology, and superior customer service to all participants in the global capital markets. Bringing together state-of-the-art new issuance systems and premier global financial and investor data, Ipreo provides innovative technology and superior insights to all participants in the capital-raising process.

Global Institutions and Contacts Data

Global Equity Buy-Side Description:

- Institutions/accounts profiled include mutual fund managers, investment advisors, hedge fund managers, pension funds, banks, insurance companies, and alternative investment vehicles. Profiles contain a synopsis of funds/portfolios managed with a description of investment strategy
- People profiles include equity investment professionals such as fund managers, analysts, traders, directors of research, and key executives along with a description of their individual investment focus and biographies
- Derived portfolio information for both people and institutions including turnover and asset allocation by region, country, industry and market cap
- Ipreo gathers, processes, and provides commissions data for U.S. mutual funds filing form NSAR with the SEC
- Nearly 20,000 public equity asset management institutions globally with 66,000 global equity investment professionals

Global Fixed-Income Buy-Side Description:

- Coverage of all major Fixed-Income instruments (corporate debt, structured debt, treasuries, sovereigns, municipal bonds)
- Institution profiles include a wide variety of firm types, including investment advisors, hedge funds, pension funds, banks, insurance companies, and mutual fund managers
- Profiles of Fixed-Income management firms feature detailed investment strategy descriptions obtained through direct contact as well as wide-reaching research executed by our team of specialized analysts
- People profiles include Fixed-Income investment professionals such as portfolio managers, analysts, traders, directors of research, and key executives along with details on their individual investment focus and biographies
- Over 100,000 institutional contacts, including over 28,000 fixed income investor contacts
- Institutional holdings for over 7,300 fixed income firms, including in-depth fixed income profiles for over 5,400 firms

Global Sell-Side Content Description:

- Comprised of sell-side equity professionals and institutions in the U.S., Canada, Eastern and Western Europe (including Russia), and South Africa
- Institution profiles include investment banks, broker/dealers, independent research firms that produce equity research, as well as U.S. industry research firms. Investment banks, broker/dealers, and ECNs that do not offer an equity research product, but are among a U.S. equity mutual fund registrant's top 10 commissions paid are also included
- People profiles include equity analysts, research associates, directors of research, and key executives (directors of sales and directors of trading) along with a description of individual focus and biographies
- The Sell-Side database is comprised of over 24,000 capital markets professionals at over 2,000 institutions that provide equity research services to institutional investors

Coverage:

Global Equity Buy-Side Institution and Mutual Fund Data:

- Reported equity and independently collected equity and total assets under management figures
- Investment strategy including market cap, style focus, research approach, and buy/sell criteria
- Contact information
- Scouting Reports (research, management, and broker vote preferences)
- 70,000+ listed mutual funds
- Commissions-related data for U.S. mutual funds

Global Fixed-Income Buy-Side Institution Data:

- Coverage of all major Fixed-Income instruments (corporate debt, structured debt, treasuries, sovereigns, municipal bonds)
- Investment strategy including buy/sell criteria, research approach and benchmarks
- Contact information

Global Sell-Side Content Institution Data:

- Overview of firm's research focus and strategies
- Contact information

Global Buy-Side and Sell-Side People Data

- Functions/Titles/Investment duties (market cap focus, investment style, country /region/sector/industry focus)
- Bio/Education background and contact information

Hedge Fund Data:

- Ipreo uses a proprietary, proactive methodology to acquire and maintain its hedge fund data
- We are in constant contact with hedge funds of all sizes in every region
- Ipreo maintains regional research offices across the globe to facilitate our hedge fund data collection
- All of Ipreo's hedge fund data is independently sourced and verified by our global research department versus "manager supplied", allowing our data to be objective and reliable
- Ipreo's focus is on collecting unique, unrivaled fundamental investment approaches and intelligence on decision-makers versus the performance and other statistical data widely available from other hedge fund data suppliers
- The details and attributes available from Ipreo are un-matched by any hedge fund data provider in the market, as is the depth of our coverage
- Global prime brokers and global investment banks use Ipreo's hedge fund data for client retention and acquisition purposes on a daily basis
- Ipreo profiles 4,800 hedge fund firms and over 15,700 hedge fund contacts globally, covering both equity and fixed income
- These hedge fund managers account for over 22,000 hedge funds