CONVERGENCE
OPTIMAL PERFORMANCE

Product Name - Fund Raising Business intelligence, or FRI

Product Description – FRI provides key business intelligence, supporting data, and competitive metrics on fund launches, fund-raising activity and peers.

Product Benefits – FRI improves your competitive positioning when raising capital. FRI provides business intelligence on fund raising activity on similar mandates in the market.

Product Features
1. **Competitive Market Intelligence** – Business intelligence in the FRI database identifies the number of new funds launched by strategy over a select time-period and gives you a comprehensive view of the market and competitive landscape for your raise.
2. **Fund Launch Intelligence** – Business intelligence includes the sponsoring adviser that launched the fund, the business profile of the adviser, the initial offering amount, the amounts sold, the number and types of clients, the minimum investment amount, the final amount sold for closed-end funds, the amount of time to close, and the marketer or broker used, if any, and the fees paid.
3. **Competitive Intelligence** – FRI competitive intelligence provides you with business insights about the sponsor of similar offerings that you can use to position your firm versus others in the market. As you know, investment performance and operational risk discovered during due diligence can make a difference in tightly contested mandates.
4. **Satisfying Institutional Investors** – You can leverage FRI pre-fundraising to improve your understanding of how institutional investors and their due diligence teams might view you. This gives you a head-start to improve controls across relevant front-middle-back-office infrastructure. FRI helps you maximize operational strengths in operations, compliance and vendor management.

Product Users – Head of Sales, Marketing, IR involved in raising capital and managing LP relationships.

Get in touch to learn more about FRI
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