



We are now Refinitiv, formerly the Financial and Risk business of Thomson Reuters. We've set a bold course for the future – both ours and yours – and are introducing our new brand to the world.

As our brand migration will be gradual, you will see traces of our past through documentation, videos, and digital platforms.

Thank you for joining us on our brand journey.



**REFINITIV**<sup>™</sup>

The Refinitiv logo, which is a blue L-shaped graphic with a diagonal line extending from the bottom-right corner of the vertical bar.

# THOMSON REUTERS LIPPER GLOBAL FUND FLOWS

## CRITICAL INSIGHT ON MUTUAL FUND FLOW TRENDS

Thomson Reuters Lipper Global Fund Flows tools provide industry-leading sales and redemptions content and analysis to provide you with the knowledge needed to understand current and historical market sentiment no matter your role in the finance industry.

Our comprehensive daily coverage of global markets allows you to view estimated net flows globally on a daily, weekly, or monthly basis. With industry-leading functionality and coverage, you are able to filter and view data in numerous ways:

- Filter net flows by Lipper's proprietary classification system to see what is happening in global markets
- Review trends by domicile to see what is happening in global markets
- Coupled with our historical data, including weekly coverage in the U.S. starting in 1992, analyze current trends to make decisions before the competition has recognized key economic events

### A TRUSTED SOURCE

Lipper has been the leading provider of content and analysis on global mutual funds for over 40 years. We work with the largest mutual fund complexes in the world, providing desktop applications and data feeds to key players at mutual fund companies, in addition to providing industry-leading benchmarking and consulting to boards of directors for mutual funds. Utilizing the knowledge we have gained over decades working with mutual fund companies, you can benefit from our knowledge when looking at fund flows no matter your job description or title.

- **Sales and Marketing** – Quickly track the competition either on a fund family basis or by classification to understand where sales opportunities exist
- **Product Development** – Stay on top of the latest global fund launches and the flows into those funds to determine when and where to launch new funds
- **Investment Banking Research Analysts** – Add thought leadership to reports as well as M&A activity by understanding where money is going and why; using our flows data you'll be able to put market events into clear perspective and allow your clients to make informed decisions
- **Sales and Trading Desks** – See where money is going on a daily basis and who needs to execute trades; our flows data will allow you to increase activity on your trading desks globally

- **Asset Managers/Hedge Funds** – Pull in Lipper's fund flows data to complement other tools on your desk for making investment decisions; our flows data can help explain historical and current market conditions and provide the extra advantage needed to create Alpha
- **Investor Relations** – Explain stock price fluctuations influenced by macro environment vs. fundamentals; identify growing managers for IR targeting
- **Economists** – Factor current investment decisions into global macroeconomic outlook

Lipper won't just provide you with our industry-leading, in-depth global coverage; our research analysts globally provide regular commentary and analysis on fund flows to help you understand the data. We have research staff located across the globe who can provide the local flavor to global fund flows data. Our research team regularly releases video commentary of current flows and monthly and quarterly papers related to flows, and talks regularly to both the media and other financial industry professionals, allowing us a unique and comprehensive insight into what is happening.

### FEATURES

Lipper Global Fund Flows tools provide user with a high degree of flexibility in accessing and working with the fund flows data. Users are able to filter by multiple classification schemes, domicile, and RFS. You can view data at the fund level, company level, classification level, and by domicile, providing you all the tools you need to access and analyze the data from multiple angles. Our website also allows you to schedule reports to be run automatically and be emailed to your inbox, and provides each user with the option to set up a dashboard that tracks the content you are most interested in seeing.

### FUND CLASSIFICATIONS

Lipper fund classifications provide the ability to make meaningful "like for like" comparisons across funds with similar investment mandates on a global basis. The Lipper Global Classification encompasses all funds tracked by Lipper and is the ideal way to understand today's global investing.

### ABOUT THOMSON REUTERS LIPPER

Thomson Reuters Lipper provides independent insight to asset managers and institutional investors on global collective investments, including mutual funds, retirement funds, hedge funds, and fund fees and expenses. Lipper offers premium-quality data, fund ratings, analytical tools, and global commentary through specialized product offerings. Trusted by investment professionals for more than 40 years, Lipper provides unparalleled expertise and insight to the funds industry.

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