

# Opportunity Hunter

The mobile, multi-channel, prospecting and sales tool.

- RIA
- Broker Dealer
- Bank
- Retirement
- ETFs
- Mutual Funds
- Closed End Funds
- Active vs. Passive

## FIND PROSPECTS, WIN THEIR BUSINESS

### Target top prospects

Prioritize prospects based on holdings representing trillions in the mutual fund, closed-end fund and ETF markets.

### Know their location

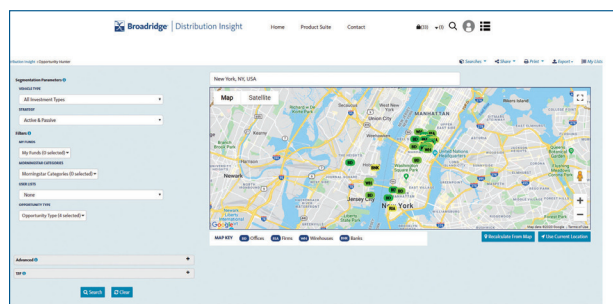
Identify key offices where your products outperform the competition, and target advisors in those offices.

### Know your advantage

Compare your funds' Morningstar® attributes to the averages in products held by RIA, Broker-Dealer, Bank or Retirement prospects.

### Have informed conversations

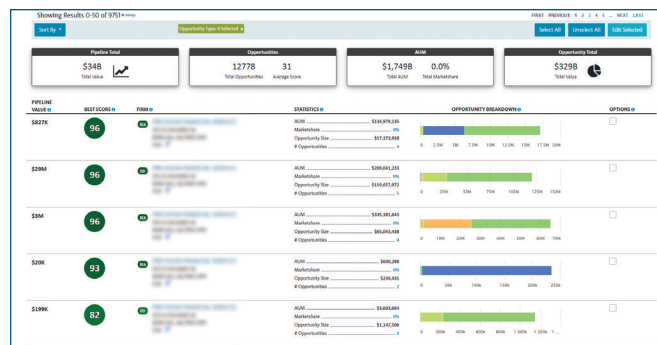
Position your funds against the competition and provide deep product-level insight.



Powerful geo-spatial tools enable you to target in any geography.

## IDENTIFY YOUR NEXT BEST OPPORTUNITY

With tens of thousands of RIAs, broker dealers, banks and recordkeepers, identifying which represent the best sales potential can be time consuming.



Accessible anytime and anywhere, Opportunity Hunter combines industry sales and asset data with almost 200 data points from Morningstar to calculate the sales opportunity for the most comprehensive industry data sets covering the entire RIA, Broker-Dealer, Bank and private sector retirement plan markets. Drill down to asset totals, asset types and individual funds – and see exactly where your funds outperform current investments. Your team can have more informed conversations that help them stand out from the competition by accessing real insight to these channels.

**“Opportunity Hunter helped us quickly narrow our universe of prospects and reduce the number of sales meetings required to close the deal by 25%.”**

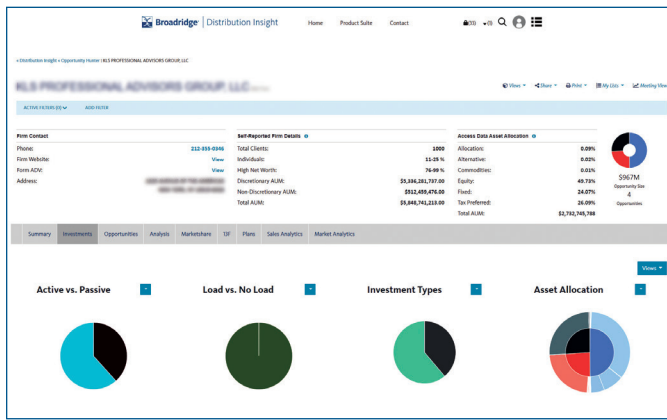
– Head of RIA sales for NY-based mutual fund company

## ACHIEVE BETTER RESULTS IN LESS TIME

Opportunity Hunter consolidates, scores, and analyzes data from multiple sources, presenting these insights in a simple, mobile-enabled user interface. Now, sales teams can spend less time researching prospects, confident that they have the insights they need for every opportunity.

- Improved Prospecting
- Greater Efficiency
- Enhanced Insight

## KNOW YOUR PROSPECTS

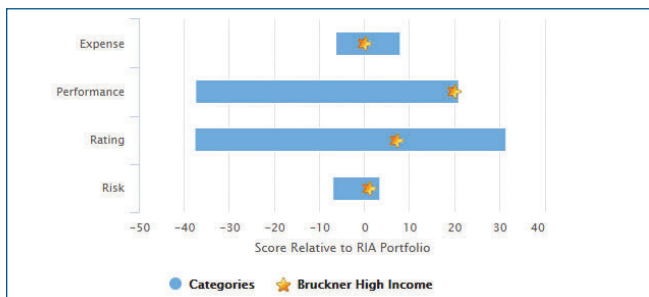


View in-depth profiles of tens of thousands of RIAs, Broker-Dealers, Banks, Recordkeepers, and private sector retirement plans including data by Morningstar Category, Active vs. Passive funds, and Investment Vehicle Type.

Accessible anytime and anywhere, Opportunity Hunter combines market data with product-level information from Morningstar to calculate the true sales opportunity across ETFs and closed end funds held by RIAs, Broker-Dealers, Banks, and Retirement Plans to identify pools of assets in Morningstar categories where your funds outperform. Your team can have more informed conversations with advisors by accessing real front-end analysis insight in these channels.

Gain instant intelligence on your best prospects:

1. Target top prospects and know your advantage
2. Know their action, what they sell
3. Have informed conversations

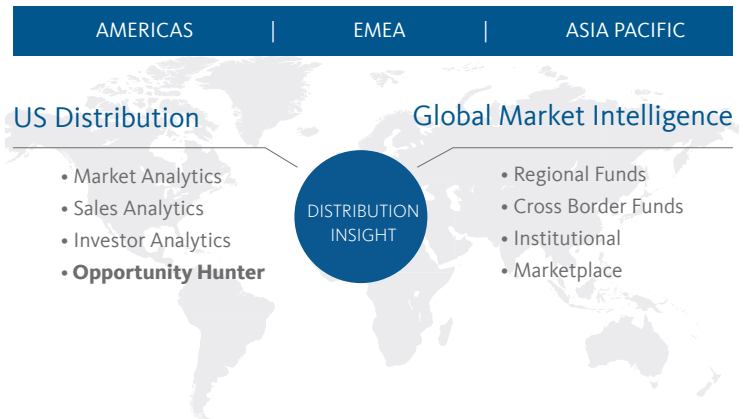


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## OPPORTUNITY HUNTER PROVIDES SPECIFIC DETAILS ABOUT EACH OPPORTUNITY AND SUMMARY OF PERFORMANCE AND EXPENSE METRICS



### US Distribution

- Market Analytics
- Sales Analytics
- Investor Analytics
- **Opportunity Hunter**

### Global Market Intelligence

- Regional Funds
- Cross Border Funds
- Institutional
- Marketplace

The Distribution Insight platform is the single access point for U.S. Distribution analytical applications like Opportunity Hunter as well as those in our Global Market Intelligence suite.

**Opportunity Hunter identifies opportunities by comparing your product characteristics against other products held by a prospect. Only Broadridge can bring together this uniquely powerful application design specifically for your sales organization. Call Fred Kosanovic at +1 412 201 6084 or email [fred.kosanovic@broadridge.com](mailto:fred.kosanovic@broadridge.com).**

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Data and Analytics

