

Exclusive Market Share Analysis



Unprecedented Visibility Into DCIO and Wealth Management Channels

The **BrightScope NEXUS** networks move beyond the limitations of public and internal data sources to deliver unparalleled insights into advisor books of business and market share across over 100,000 advisors and 326,000 DC plans.*

With increased transparency into market share, asset managers can not only strategically assess their market position, but more importantly, act on it.

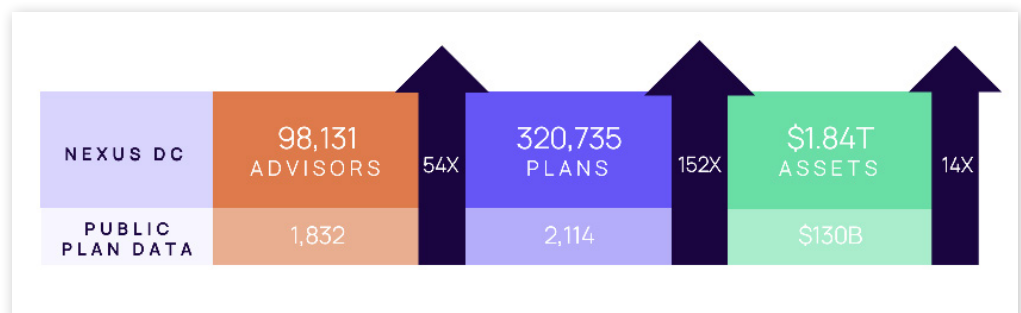
NEXUS enables deeper segmentation of advisors across the DC plan landscape.

Assess Areas of Growth with Trended Insights

Identify quality opportunities by analyzing your market share across advisors, RIAs, broker-dealers, and dual-registered firms. Quickly assess flows and assets by category to easily understand how business has changed over time, as well as identify areas to engage defensive strategies.

The NEXUS Lift

NEXUS DC reveals new advisor-to-plan connections and market share by category, enabling the most complete view of an advisor's book of DC business and market share.



*Data as of September 2024

NEXUS DC Segmentation

Search and view segmentation on advisor reports for an immediate impression of the advisor's footprint in the DC space.

Beacon

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Segmentation Category	Primary Standard	Secondary Standard	Advisor Count	Plan Count	Net Assets
Elite	20+ Plans	5+ Plans and \$100M+ in Assets	5,376	144,567	\$1,204B
Specialist	10+ Plans	3+ Plans and \$40M+ in Assets	5,567	49,952	\$372B
Emerging	2+ Plans	\$5M+ in Assets	38,700	111,590	\$522B
Accommodator	1 Plan		49,621	51,914	\$45B

Drive Your Firm Forward with Actionable Intelligence

Utilize NEXUS to boost sales efforts, define market share, support compensation and improve segmentation. Score penetration rates across territories, within focus firms, and at the individual advisor level. NEXUS' dynamic search capabilities allow teams to target the right opportunities with the right messages.

- Improve segmentation with exclusive insights into which advisors and firms drive the most flows using BrightScope's DC Advisor Segmentation model.
- Strategically analyze assets and inflows at the broader asset class level or dive deeper into the fund category level.
- Boost your understanding of a firm and advisor's book of business through asset level flows and market share intelligence.
- Provide increased sales transparency at the advisor and plan level for your DC business.
- Enable wholesalers to quickly and accurately pinpoint their best opportunities across territories via prescriptive tools which allow your teams to create more efficient targeting strategies.

About ISS Market Intelligence



ISS Market Intelligence (MI) is a leading provider of data, insights, and market engagement solutions to the global financial services industry. ISS MI empowers asset and wealth management firms, insurance companies, distributors, service providers, and technology firms to assess their target markets, identify and analyze the best opportunities within those markets, and execute on comprehensive go-to-market initiatives to grow their business. Clients benefit from our increasingly connected global platform that leverages a combination of proprietary data, powerful analytics, timely and relevant insights, in-depth research, as well as an extensive suite of industry-leading media brands that deliver unmatched market connectivity through news and editorial content, events, training, ratings, and awards.

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