

# FE fundinfo Ratings

Independent and unbiased ratings trusted by fund selectors, financial advisers and retail investors

FE fundinfo Ratings can support your funds' success and raise their visibility on a global platform. Our ratings are a hallmark of trust and integrity born out of an independent, unbiased and transparent methodology.

Our ratings are trusted by fund selectors, financial advisers and retail investors around the world. They help fund managers and advisers compare funds, and help investors make informed investment decisions which, in turn, supports the growth of assets under management in an increasingly competitive marketplace. We are the only ratings provider that evaluates all the key performance attributes of a fund such as fund performance, manager track history and index tracking consistency.

## Benefits



### Strength in numbers

FE fundinfo powers the financial advisory industry with investment research and tools. Our reach is unrivalled. We have more than 9,000 users of FE Analytics and 200,000 fund searches conducted on Trustnet every month.



### Showcase your funds

Not all funds are created equal. You can position and differentiate your funds based on key features, including:

- Strong performance
- Manager track history
- Index tracking consistency
- Best in asset class



### Independent and unbiased

Our ratings are quantitatively based and powered by our robust and independent ISO accredited database. You can enhance your credibility directly with your target audience and influence the growth of your assets under management.

## Why FE fundinfo

### Our promise

FE fundinfo connects fund managers and fund distributors facilitating efficient investment decisions based on trusted, insightful information.

Contact us at [enquiries@fefundinfo.com](mailto:enquiries@fefundinfo.com) for more information on how we can help you grow your assets under management, including:

- Data Feeds
- Digital Solutions
- Content Dissemination

## Our suite of ratings

### Crown Rating



The Crown Fund Rating is a global quantitative rating that is based on a fund's historical performance relative to an appropriate benchmark, carefully chosen by our research team. The rating relies on three key measurements - alpha, volatility and consistent performance, to dictate the one-to-five Crown score. The ratings are designed to help investors distinguish funds that have superior performance in terms of stock picking, consistency and risk control.

### Passive Crown Rating



Unlike an active fund which attempts to beat its designated benchmark, passive funds and exchange-traded funds attempt to track their index, with the aim of delivering a return as closely in line with it as possible. The Passive Crown Fund Rating incorporates the tracking difference, tracking error and fund size to rate consistency.



The Alpha Manager Rating is a quantitative rating that distinguishes the top UK fund managers based on alpha generation and outperformance across their career history, allowing investors to instantly identify those managers who have consistently outperformed their peer group over time. Only the top 10% of UK managers receive this accolade, representing those managers who are the very best of the best in the industry.



Combining multiple ratings and qualitative research, our research team run an outsourced investment proposition for advisers that combines fund selection, risk-targeted portfolio management and governance. The bedrock of our research proposition is its fund list - the Invest Approved List. The Invest Approved List has been scrutinised from all angles and represents the best funds, fund managers and investment houses in the industry.



The AFI is made up of the recommended portfolios of a panel of leading UK financial advisers. Advisers and investors alike can look for funds recommended by this influential panel for reassurance or new ideas in fund selection.

### Risk Score

23

Provides a single, easy to understand measurement of the relative risk level of individual investments or an entire portfolio.

For more information please contact:

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#### FE fundinfo offices

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