



EQUIFAX

MarketVision for Securities

Exclusively for IXI Network members

Effective peer group analysis for brokerage and mutual fund institutions

MarketVision™ for Securities enables securities firms to determine their market size and share, find high growth areas, and identify consumer demand for any investment product and product category — all based on direct-measured™ consumer financial assets.

- Determine your firm's market share and assess performance based on changes in share over time
- Track the size and growth rate of any market — be the first to find and penetrate growing markets
- Assess performance in capturing new accounts
- Enhance brand development and fine-tune marketing campaigns

Comprehensive competitive analytics to improve share

Unlike other market assessment systems that use survey or other estimation techniques, MarketVision for Securities reports directly measured consumer financial assets. MarketVision for Securities data is based on approximately \$20 trillion of directly measured assets submitted by our network of the nation's leading financial institutions. Data is used by many of the largest U.S. financial firms for peer group analysis and market sizing. All figures are updated two times per year.

Get your share and determine market size

MarketVision for Securities enables your firm to assess its share of consumer assets and compare markets by penetration and potential. Data can be analyzed:

- **By geography:** Track market size, market growth, market share, growth in share, and consumer product demand for any custom geography or for any standard geography (state, CBSA, County, ZIP)
- **By account and product type:**
 - Over 65 security types
 - 72 fund investment objectives
 - Multiple account type details

Key benefits

Leverage directly measured assets to track market size and share vs. peer group and find growing markets

Assess firm performance in capturing new accounts

Enhance branch planning and sales force management

Developed for use in non-FCRA applications

Track your share of new accounts and assets

With MarketVision for Securities, your firm can assess performance in capturing new accounts broken out by account size at the county level and higher. Share statistics for new accounts opened within the calendar year are available at 12-month intervals, allowing for appropriate allocation of resources and performance tracking.

Target growing markets and enhance branch planning

Because MarketVision for Securities relies on directly measured consumer financial assets, your firm can easily locate growing markets with strong demand for your investment products. Plus, your firm can analyze where its next branch office should be located and reallocate resources accordingly. The data can also assist with tracking sales performance, locating high performing regions, and enhancing forecasting.

Fine-tune marketing campaigns and offers for securities products

MarketVision for Securities helps marketers fine-tune branding efforts, marketing campaigns, product offers, and seminar development based on measured product preferences. Analysts can discover ownership of a variety of investment products, yielding insight into possible cross-sell and upsell opportunities.

An advanced solution to assess your target markets

MarketVision for Securities' market size and share data can be retrieved online and real-time via our online solutions portal. Our online tool provides data at all levels — executive summary reports, maps, and raw data — for standard geographies or custom territories.

Using our online tool's data export function, securities firms can calculate their share of peer group for any custom defined study area by product and account type. The chart below shows that the Sample Firm has a large share of Domestic Equities in Regions B and D, but has significant development opportunities in Regions A and G.

| Study area | Sample discount brokerage firm | All discount brokerage firms | Share of peer group |
|--------------|--------------------------------|------------------------------|---------------------|
| | Domestic Equities | Domestic Equities | |
| Region A | \$415K | \$4,356K | 9.5% |
| Region B | \$326K | \$1,053K | 31.0% |
| Region C | \$102K | \$965K | 10.6% |
| Region D | \$2,117K | \$6,483K | 32.7% |
| Region E | \$26K | \$703K | 3.7% |
| Region F | \$747K | \$3,648K | 20.5% |
| Region G | \$311K | \$5,226K | 6.0% |
| Total | \$4,044K | \$22,434K | 18.0% |

Please contact us for more information about MarketVision for Securities.

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Because the data is trendable, it's the ultimate tool to keep track of your competitors and alter your strategy based on their positions and actions.