FINTRX

EQUITY ASSET MANAGERS

FINTRX Use Cases & Value Drivers for Asset-Raising Professionals

Use-Cases

- Leverage comprehensive private wealth data to identify potential long-only fund investors.
- Identify firms with expertise or interest in sectors and industries relevant to your fund strategy. Filter by asset class interest, AUM, client types, account size and more to identify ideal prospects for your fund.
- Monitor the investment activities of other equity asset managers or long-only fund managers in the market for your long-only strategy.
- Utilize the keyword search functionality and other advanced filtering options to identify firms involved in specific long-only deals.
- Conduct due diligence on family offices & RIAs by analyzing their historical performance, investment strategies and regulatory history.
- Segment family offices & RIAs by AUM and target entities with the appropriate client types & account sizes.
- Stay ahead of the competition by monitoring the investment activities and strategies of other equity asset managers or long-only fund managers in the market.
- Integrate FINTRX data with existing workflows and systems using the API data feed to enhance deal sourcing and monitoring processes.

Value-Drivers

- Maximize value by leveraging FINTRX insights for informed long-only capital-raising strategies, securing profitable deals with confidence.
- Increase success by narrowing down your search to investors specifically interested in traditional long-only investments.
- Enhance ROI by identifying potential buyers or sellers for long-only funds through the monitoring of direct investment activity.
- Save time & effort by utilizing accurate contact information for key decision-makers involved in traditional long-only funds.
- Boost efficiency by connecting with industry peers, sharing insights and exploring potential collaboration opportunities within the equity asset management community.
- Streamline prospecting by utilizing smart lists, dynamic mapping & custom alerts to build & manage relationships with investors, track communication history & ensure personalized engagement.
- Boost deal success by leveraging comprehensive private wealth data to identify potential partners for joint ventures, co-investments, or direct investment opportunities.

FINTRX Solves Critical Questions Such As...

- Which family offices invest in our strategy?
- Who has recently invested in funds like ours?
- Which RIA's allocate to external equity shops?
- Who in my network can introduce me to the right contacts?

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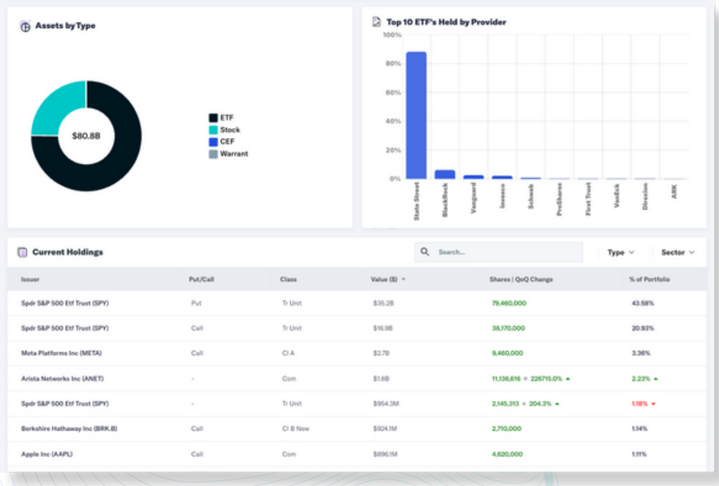
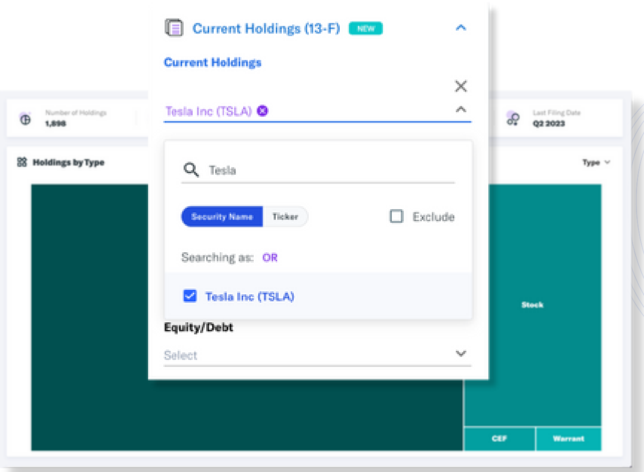
Track 13-F Securities Data

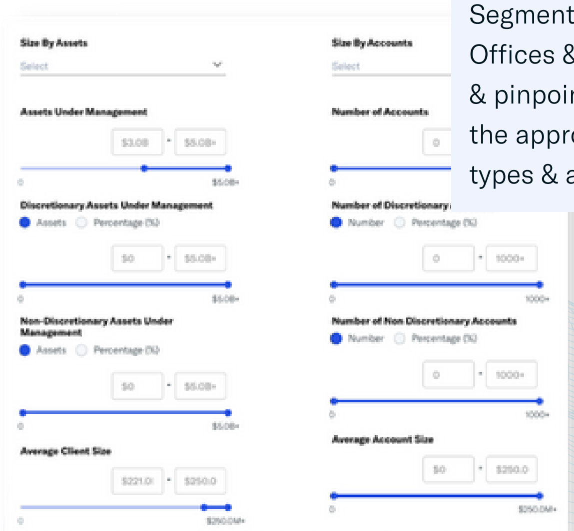
Monitor and analyze ETF & equity portfolios, and uncover industry stock market trends.



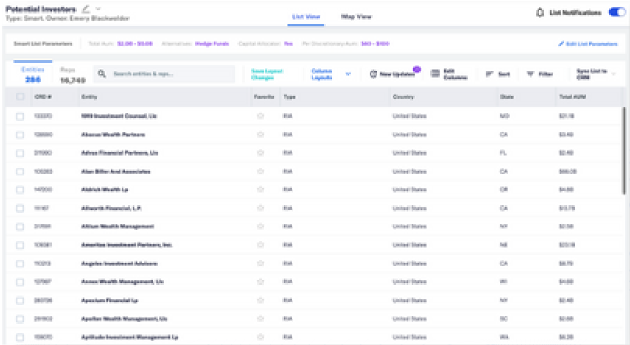


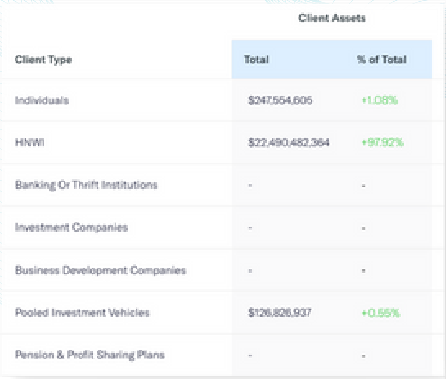
Utilize the full suite of 13-F filters to drill into individual tickers, holding amounts, types of securities, changes over time and more.

Analyze AUM & Account Intel



Segment Family Offices & RIAs by AUM & pinpoint entities with the appropriate client types & account sizes.





...as well as full RIA client breakdowns with account & AUM changes over time.

Save all of your prospects to a list and utilize tags, tasks, & custom properties to make tackling your research & outreach easier.

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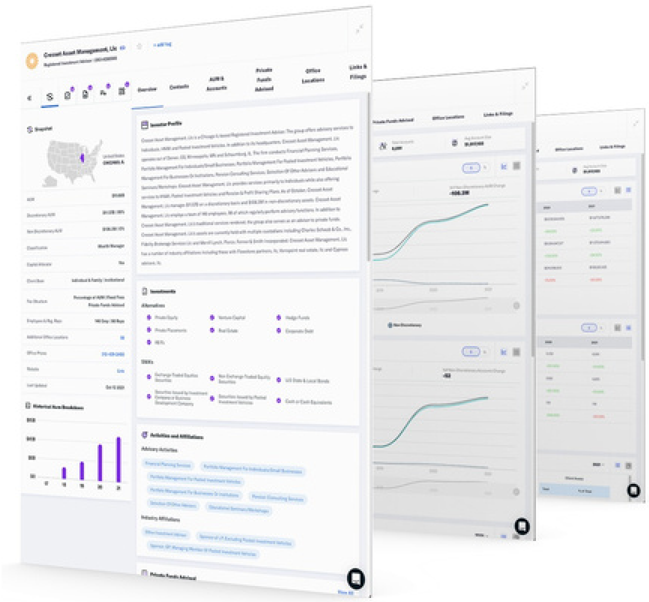


FINTRX Overview

FINTRX is a private wealth data intelligence platform that provides global financial firms a centralized source for in-depth & credible insights on family office, registered investment advisor (RIA) & broker dealer data. It's specifically designed for asset-raising professionals to source accurate data while increasing efficiency and saving valuable time.

FINTRX sources data from both public and private sources and is comprised of 75+ researchers who map, validate and compile data daily to ensure accuracy.

850K+

Registered Investment Advisor (RIA) & Broker Dealer Records

25K+

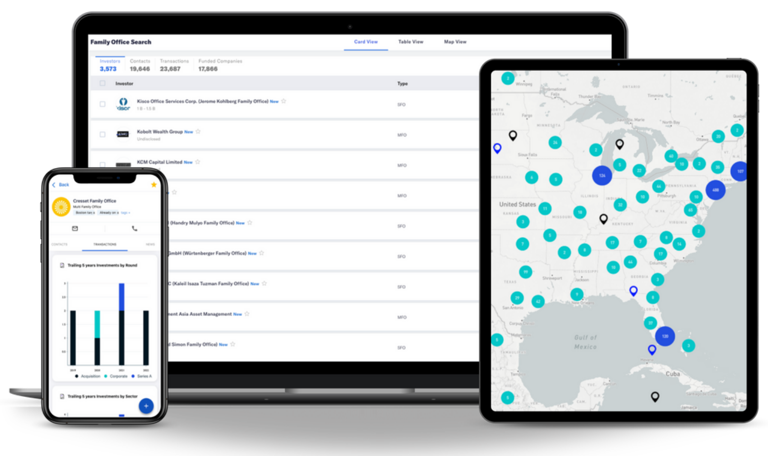
Family Office Records

$115 Trillion+

Managed Assets Tracked

600K

Email Addresses of Key Investment Professionals



Join the hundreds of traditional asset managers who trust our unparalleled data and intuitive prospect management tools to source investors.

Email us: **sales@fintrx.com**

Book a demo: **Here**

Call us: **(617) 517 - 0789**

Visit us: **fintrx.com**