

Manager Analytics

Help *Drive* your Distribution

A Modern Interface with Actionable Data

Understand your market share and grow your business

The SMArtX Analytics platform offers Asset Managers detailed reporting to analyze their business and insightful prospecting data to help them identify their top opportunities to drive distribution.

Features Include



Business Snapshot

Gain a comprehensive view into your book of business on SMArtX, providing valuable insights about your product growth and client base



Advisor Access

Identify the best prospects, helping you tailor your engagement and support



Business Expansion

Discover potential areas to drive new business growth within SMArtX

Platform Data to Support Business Development

Unlock deeper insights to drive informed growth

Get a clear view of how your strategies are being used on the SMartX platform. See who's allocating, how your market share compares, and where there's room to grow. With detailed data on flows, advisor activity, and platform positioning, you can spot high-potential opportunities, focus your outreach, and make smarter decisions to strengthen your presence and grow your business.

Actionable Data to Drive Distribution

Data Packages



Base

Track new and historical advisor allocations with performance data and contact details, updated regularly.



Core

Essential visibility into your firm's presence on SMartX with key data, filters, and advisor contact info.



Insight

Build targeted sales strategies with platform rankings, advanced filters, and geographic asset insights.



Fund

Track Mutual Fund and ETF usage with asset data, third-party insights, and fund-specific prospecting tools.



Complete

All-in-one access to Core, Insight, and Fund data for a comprehensive view of your business on SMartX.