



cogent syndicated

# Cogent Beat<sup>™</sup> Investor

A new way to discover,  
interpret and influence  
your marketplace

The rhythm of the marketplace is complex.  
Find your own beat.

Cogent Beat Investor gives you the ability to evaluate your brand, track engagement, benchmark against competitors and even predict future trends—whenever, wherever and however you want. This powerful research tool enhances and integrates with our annual Investor Brand Builder<sup>™</sup> report and helps keep your finger on the pulse of evolving investor attitudes and behaviors to effectively retain and grow assets. It's a prospective view of the marketplace from the perspectives that matter to you most.

## CONTINUOUS

Get the data you need as often as you need through our state-of-the-art technology platform

## PERSPECTIVE

See and understand the landscape from both a broad and focused perspective, and select the time frames and subgroups that are most relevant to you

## PROSPECTIVE

Track where you are and what's ahead with the most powerful insights about your brand, your competitors and the marketplace

# Cogent Beat Investor Overview

**Cogent Beat Investor addresses and supports the specific needs of multiple user groups within distributors and mutual fund and ETF providers.**

## BRAND AND CHANNEL MARKETING

Track your brand health among the segments(s) of the market you care about.

## PRODUCT AND SERVICE DEVELOPMENT

Tap into the current goals and objectives of investors and track their interest in and use of advice and products.

## MARKET RESEARCH AND COMPETITIVE INTELLIGENCE

Use a wealth of information tailored to the specific needs of your internal stakeholders to provide the best, most current data and insights available.

## FEATURES

### Continuous Data Collection

- Monthly data feeds via the intuitive, easy-to-use Cogent Beat™ portal

### Thoughtful Analysis

- Quarterly written market summaries from Cogent Syndicated analysts
- Annual Investor Brand Builder report and customized presentation
- Access to team of wealth management analysts

### Prospective View

- New-product adoption
- Emerging investment trends
- Future brand consideration

### Flexible Online Reporting Tools

- Robust filtering capability to create customized dashboard views (e.g., time frame, advised vs. self-directed, clients vs. prospects, product use)
- On-demand research tools for deeper analysis from the comprehensive dataset
- Quick export function to share, save and export charts and tables
- On-demand, in-depth data analysis

## SAMPLE SIZE AND METHODOLOGY

- 1,200 affluent investors (\$100K+ in investable assets including DC plan and IRA assets and excluding value of primary real estate)

## SUBSCRIPTION INVESTMENT: \$125,000

- 12-month subscription
- 10-seat license for unlimited online access to client portal
- Monthly data feeds
- Quarterly written marketplace summary and analysis
- Annual Investor Brand Builder™ report
- Annual Investor Brand Builder™ presentation
- 15 analyst hours
- Portal training and help desk access

# Cogent Syndicated is the most trusted, reliable and agile source for wealth management insights.

We've been inside the industry for over 20 years. Every single day we are talking to your most valuable clients, customers and prospects—they know us and they trust us. Our curated, stable sample of investors is truly representative of the entire affluent investor universe. Our team of industry experts distills data to help brands translate human behavior into future products and messages that keep you ahead of transforming market needs.

## Talk to us.

P: +1 734 542 7600  
E: COGENT@ESCALENT.CO  
ESCALENT.CO

**Pinpoint competitive weaknesses to elevate brand, increase market share and benchmark your firm against competitors with our robust suite of investor research.**

### MEDIA CONSUMPTION™ INVESTOR

Track media usage patterns and preferences to inform media buys and maximize investor reach

### INVESTOR BRAND BUILDER™

Enhance investor segmentation and identify opportunities to boost market share and profitability

### AD EFFECTIVENESS™

Assess the reach and effectiveness of advertising messaging using our ongoing research with affluent investors

### BRAND LIFT™

Prove the impact of advertising on brand perceptions and key performance indicators using our ongoing research with affluent investors

