

Calculate & Enrich

# Risk Profile Peer Group Benchmarks

Insightful risk profile analysis to drive performance and strategy

Whether you're a fund manager, asset consultant, platform provider or third-party data vendor, having access to like-for-like performance comparisons is critical to evaluating and showcasing performance.

FE fundinfo data is trusted by some of the world's leading fund distributors as their primary source of key fund information, ensuring business continuity and security with supporting robust systems, stringent automated validation processes and dedicated teams to ensure ongoing data integrity.

## INTRODUCING RISK PROFILE PEER GROUP BENCHMARKS

Our Risk Profile Peer Group Benchmarks offer precise data for fund and portfolio evaluations, enabling data-driven decisions in a fast-changing market. They cover Australian managed investments, investment bonds, retirement income, and super funds, displaying performance data and quartile rankings of benchmark constituents.

## FE FUNDINFO FUND CLASSIFICATION SYSTEM

FE fundinfo's robust classification system groups funds by applying a tailored sector to each, forming peer groups that enable accurate, like-for-like comparison. Each sector is crafted to reflect the asset classes and geographic nuances relevant to local markets, ensuring meaningful insights and comparability for investors.

Our method rigorously defines criteria for each sector, allowing only funds that fully meet the standards to be included. Using comprehensive data from fund groups and regulatory documents, FE fundinfo updates sector classifications to reflect changes in the fund landscape. This dynamic approach means funds are accurately classified, with sector sets regularly reviewed and updated to ensure relevance and alignment with evolving market conditions.

## PEER GROUP BENCHMARKS AVAILABLE

Our benchmark sector splits include:

- Mixed Asset - Cautious: 0% - 20% Growth Split
- Mixed Asset - Moderate: 21% - 40% Growth Split
- Mixed Asset - Balanced: 41% - 60% Growth Split
- Mixed Asset - Growth: 61% - 80% Growth Split
- Mixed Asset - Aggressive: 81% - 100% Growth Split
- Mixed Asset - Flexible: Absolute return vs. custom

## KEY FEATURES

### Manager evaluation

For actively managed funds, our peer group benchmarks help evaluate the fund manager's effectiveness and compare performance in relation to peers with similar strategies.

### Risk and return characteristics

Our peer group benchmarks help evaluate the risk-adjusted return of a portfolio to determine the competitive positioning in relation to other funds within the same peer group.

### Like-for-like comparison

Our peer groups consist of funds that invest in the same or similar classification or sector, follow similar investment strategies, or target similar market segments.

### Investor decision-making

Our peer group benchmarks provide transparency for investors and support investment decision-making by enabling them to assess whether a specific investment is keeping up with its peers in terms of risk and return.

## THE BENEFITS



### Customisable

You have the flexibility to customise your data feeds via our portal – select your funds, fields, format, investments and instrument universe.



### Seamless data exchange

We facilitate the seamless exchange of data into your own systems so that your teams can easily access and leverage it anywhere, any time. We also pioneered a global standard ('openfunds') together with leading financial institutions, to establish a common industry standard and facilitate the seamless exchange of data.



### Bundle and save

Bundle your benchmark data feeds to receive great discounts, such as an FE Analytics licence to gain the ability to review peer group constituent data for deeper research and insight into underlying holdings.



### Flexible delivery options

Various delivery options are available including openfunds and FinDatEx, as well as technical specifications covering CSV format, batch files transferred over FTP, SFTP, email, and choice between a full file and delta files, as well as API\* (\*delivery options may vary depending on the data type).

## Why FE fundinfo?

We connect the fund management industry to inform better investment decisions. Our data, technology, research, network and insights empower fund managers, distributors and financial advisers.

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