



Convergence Competitive Assessment

Market share, growth attribution, and competitor intelligence

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Product Description

- Competitive Assessment helps asset management service providers and asset managers understand how they are growing relative to the overall market and their Top 25 competitors. The product measures market share by total market, fund type, and strategy, then explains growth through acquisitions, existing-client expansion, new adviser relationships, switches, dropped funds, and asset growth.

Product Benefits

- **Clarifies Competitive Position:** shows where the client is gaining or losing share across funds, assets, strategies, fund types, and peer groups.
- **Separates the Sources of Growth:** distinguishes organic wins, acquisitions, existing-client expansion, switches, closures, and asset movement.
- **Strengthens Executive Reporting:** creates independent, evidence-based intelligence for sales strategy, board discussions, and market planning.

Product Features

- **Market Share Ranking:** measures current position and movement relative to the market and selected competitors.
- **Fund Type and Strategy Benchmarking:** compares performance across private funds, public funds, strategies, and adviser segments.
- **Win, Loss, and Growth Attribution:** identifies funds and assets won from competitors, lost to competitors, acquired, expanded, or dropped.

Primary Use Cases and Delivery

- **Primary Users:** executive management, sales, strategy, client management, finance, marketing, and competitive intelligence teams.
- **Common Use Cases:** annual planning, competitor reviews, market share tracking, board reporting, territory design, and account targeting.
- **Why Convergence:** the analysis uses curated fund, adviser, asset, relationship, and service provider data to provide an independent market view.

To Learn More About Competitive Assessment Contact:

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