



Convergence UMG Benchmarking

Peer-based productivity, operating, risk, and growth intelligence

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Product Description

- UMG Benchmarking enables clients to compare investment managers with statistically similar peer groups using Convergence similarity scoring. The product evaluates managers across operating scale, headcount, risk, service providers, clients, and growth, with peer groups constructed from manager type, size, fund exposure, strategy mix, and registration status.

Product Benefits

- **Creates More Relevant Peer Context:** benchmarks managers against highly comparable firms rather than broad market averages.
- **Strengthens Relationship and Sales Intelligence:** shows operating scale, growth trends, risk conditions, and service provider usage for better client conversations.
- **Integrates Comparative Analytics:** brings operational, regulatory, risk, growth, and provider benchmarking into UMG Profiles and dashboard workflows.

Product Features

- **Dynamic Peer Group Construction:** uses manager type, size band, fund type, strategy, and similarity scoring to build comparable populations.
- **Operational and Risk Benchmarking:** compares headcount, workload, complexity, and absolute or relative operating, compliance, regulatory, and provider risk.
- **Service Provider and Growth Analytics:** evaluates provider relationships, assets, funds, market share, client expansion, and relative peer rankings.

Primary Use Cases and Delivery

- **Primary Users:** asset managers, service providers, relationship managers, strategy teams, risk teams, consultants, and executive leaders.
- **Common Use Cases:** manager benchmarking, operating model review, client discussions, service provider analysis, peer positioning, and growth diagnostics.
- **Delivery:** automatically constructed peer groups and comparative dashboards within UMG Profiles and Metabase.