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MMI OnDemand

Introduction

MMI OnDemand is a members-only business intelligence platform that provides instant access to data and information on the investment advisory solutions (IAS) industry. OnDemand is organized into a series of four dashboard collections, which are highlighted below. Each collection focuses on a particular subject area. For example, the first set of dashboards provides current-quarter comparative statistics while the second set focuses on longer term trends. These dashboards are easily accessed through a drop down menu on the homepage.

MMI
ON Demand

MMI OnDemand was developed in response to member firm requests for greater access to MMI proprietary data and analytics.

Dashboard Menu

IAS Snapshot Dashboards			
Industry—Assets	**Industry—Net Flows**	**Sponsor Firm—Assets**	**Sponsor Firm—Net Flows**
Quarterly industry assets by market segment	Quarterly industry net flows by market segment	Individual sponsor firm assets and growth by market segment	Individual sponsor firm net flow data by market segment

IAS Trends—Annual Dashboards	
Industry—Assets and Net Flows	**Sponsor Firm and Peer Group—Assets and Net Flows**
Annual assets and net flows from 2007 by market segment	Annual assets and net flows from 2007 Self-select peer group and market segment

Rankings Dashboards	
Sponsor Firm—Assets	**SMA Manager—Assets**
Ranks sponsor firms across industry by market segment	Ranks managers across SMA industry by traditional, model and total SMA

SMA Trends—Annual Dashboards	
SMA Industry—Assets	**SMA Manager and Peer Group—Assets**
Annual assets from 2007 by investment objective and discipline; By traditional, model and total SMA Filter by SMA manager	Annual assets from 2007 by investment objective and discipline; By traditional, model and total SMA assets Self-select SMA manager peer groups

Key Features

- Key Performance Indicators (KPIs)
- Using filters to customize charts and underlying data
- Drilling down into data tables for more granular information
- Mobile capabilities (iPad)
- Real time data uploads
- Dynamic sorting of data by clicking on arrows in the column heads
- PDF export feature
- Screen export feature
- Excel export feature

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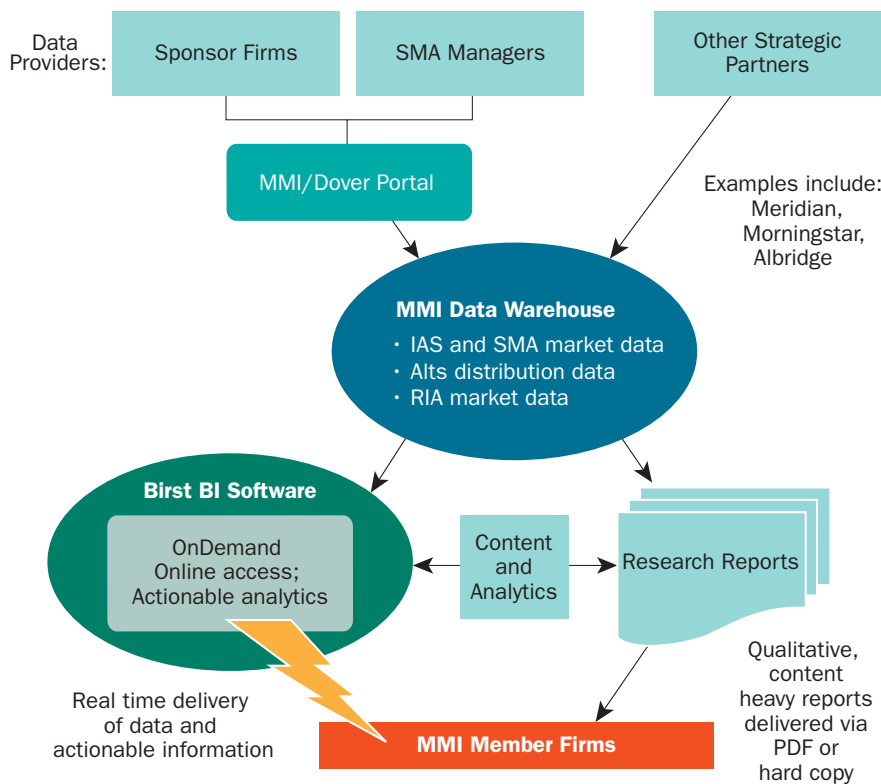
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MMI OnDemand

The Future Vision of the Platform

MMI OnDemand was developed in response to member firm requests for greater access to MMI proprietary data and analytics. But, the vision of OnDemand reaches beyond MMI's current data by leveraging third party research and data on complementary areas of the IAS industry, such as the RIA marketplace. MMI's strategic vision includes the blending of both proprietary and non-proprietary data in a way that delivers value for members. Members benefit from exclusive access to unique information and insights on critical IAS subject matter. The illustration below provides a high level overview of the platform.

The MMI OnDemand Platform

Data Providers:

Sponsor Firms | SMA Managers | Other Strategic Partners

MMI/Dover Portal

Examples include: Meridian, Morningstar, Albridge

MMI Data Warehouse
· IAS and SMA market data
· Alts distribution data
· RIA market data

Birst BI Software

OnDemand Online access; Actionable analytics

Content and Analytics

Research Reports

Real time delivery of data and actionable information

Qualitative, content heavy reports delivered via PDF or hard copy

MMI Member Firms

MMI OnDemand is developed on the Birst business intelligence (BI) software platform. Birst is a San Francisco-based firm specializing in enterprise BI solutions.

DOVER FINANCIAL RESEARCH

About Dover Financial Research

Dover is a boutique Boston-based research and consulting firm specializing in the financial services industry. Dover performs data collection, analysis, and independent research on behalf of MMI which provides the foundation for key research reports and initiatives. For more information, visit *www.doverfr.com.*

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