



Marketing Tips for Creating a Compelling Presentation Using StyleADVISOR to Define Your Edge

Deborah G. George
President, Growing Emerging Managers' Services
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Marketing 101

- Be first.
- Be best.
- If you cannot be first or best, create a category in which you can be first or best.

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Institutions will hire you if they:

- Know you
- Like you
- Trust you
- Understand your process
- Believe your success is repeatable
- Remember you

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Why are charts and graphs important?

“ ...Hear a piece of information, and three days later you’ll remember 10% of it. Add a picture and you’ll remember 65%. ”

.....Fast Company, September 25, 2013

“Why We’re More Creative When We’re Tired, and 9 Other Surprising Things About How Brains Work, by Belle Beth Cooper”

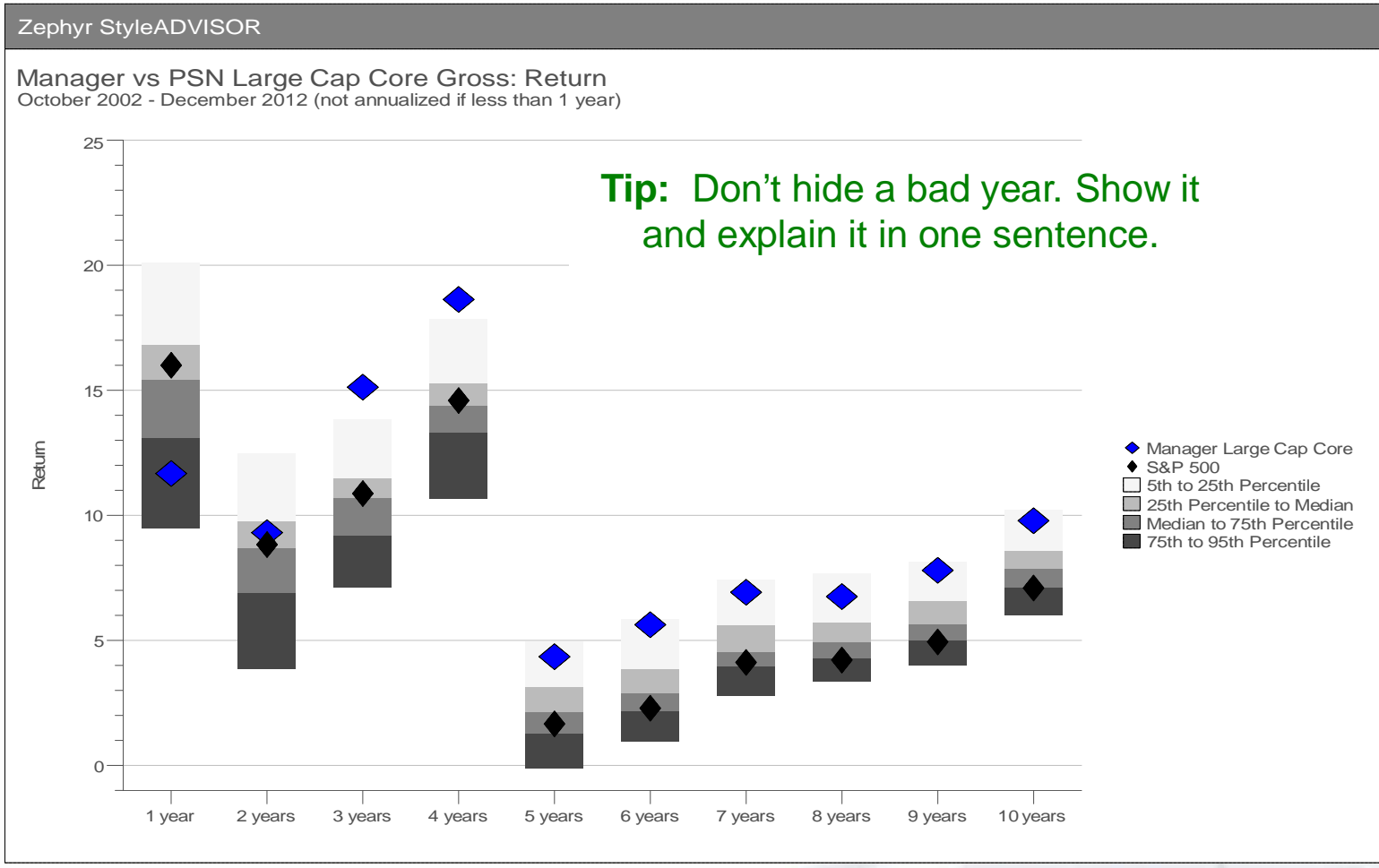
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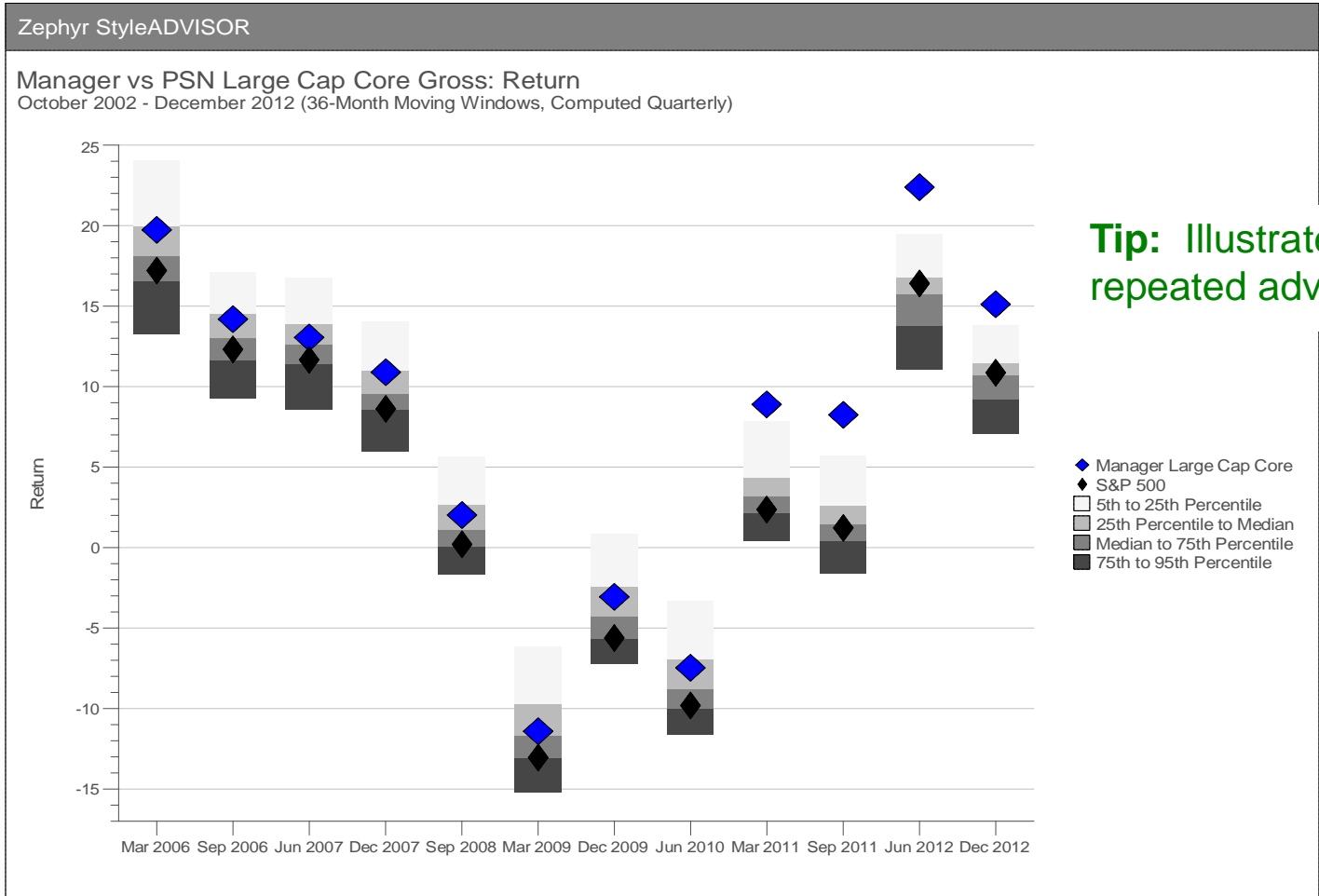
Use StyleADVISOR to picture your strengths

- Analyze your strategy against the benchmark, within peer group and over time.
 - Style
 - Return
 - Standard deviation, Tracking error
 - Beta, Alpha
 - Sharpe ratio, Information ratio
 - Upside capture, Downside capture, Maximum drawdown
 - *What else, specific to your strategy or strength?*
- **“Pictures” of your strengths and advantages will emerge**

A good example of competitive strength

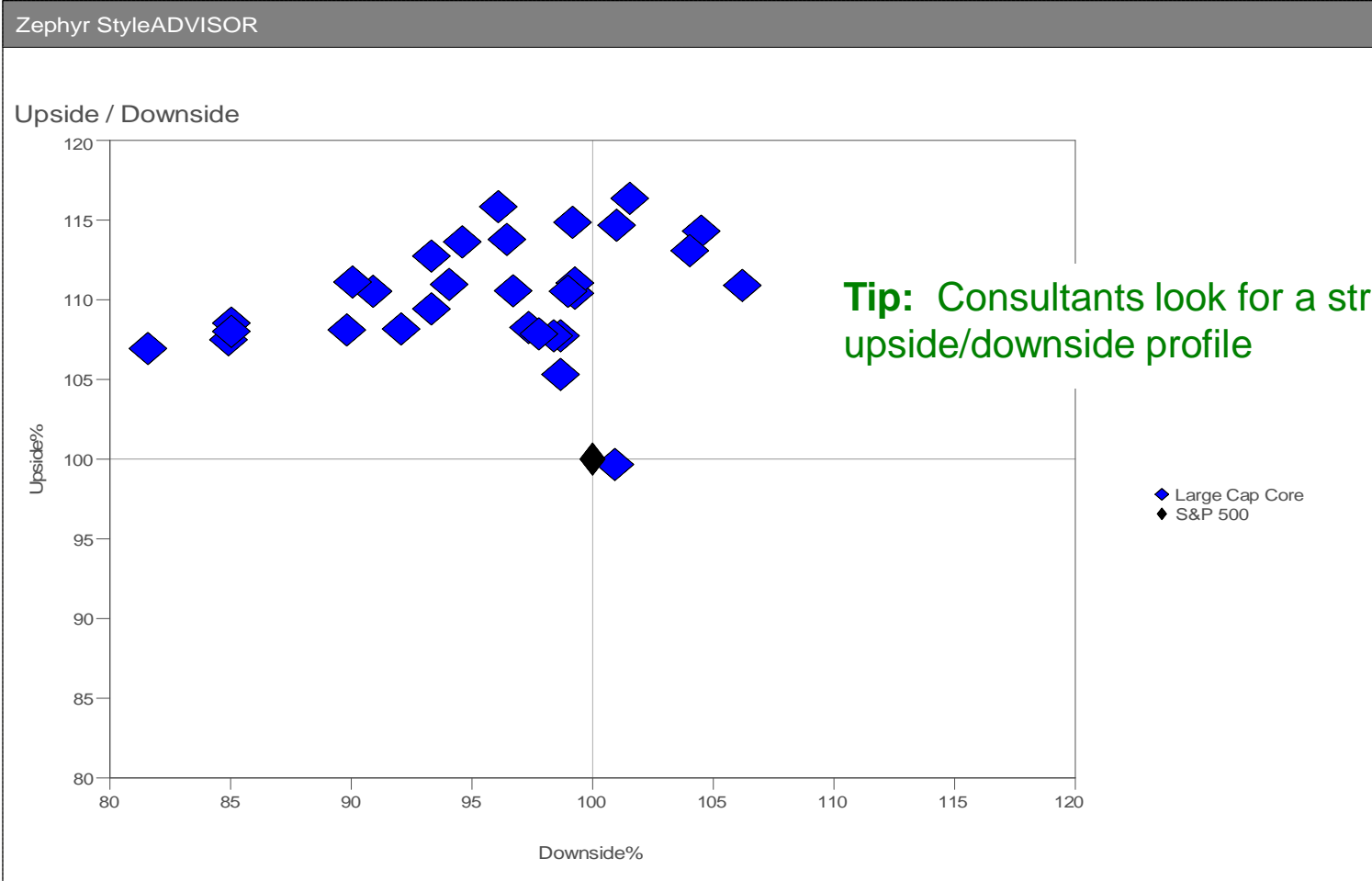


Change the time period: Rolling 3 years



Tip: Illustrate a pattern of repeated advantage

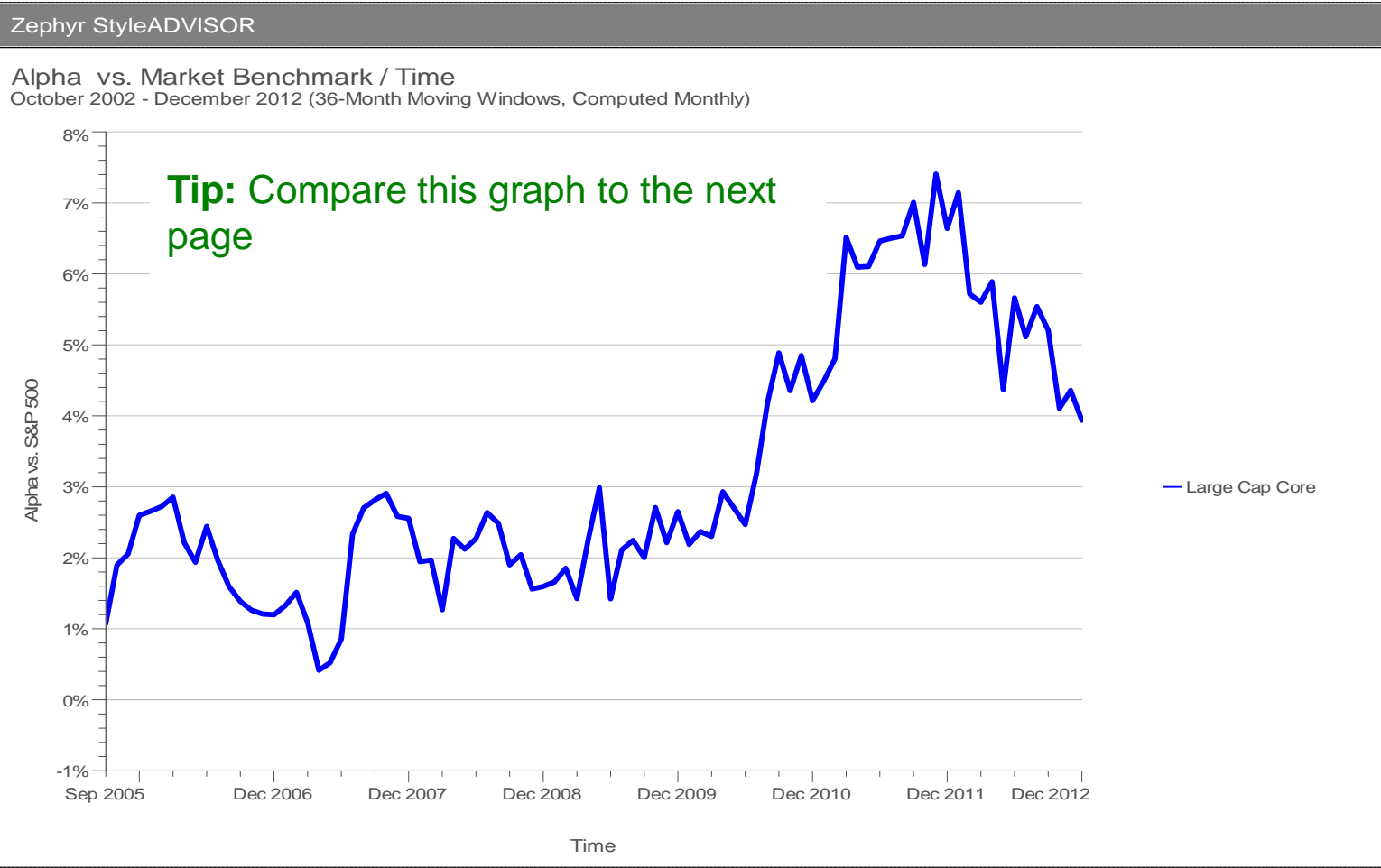
Look beyond return: Upside/Downside



Choose graphs that support your story

- Select 3 to 5 graphs and/or tables that illustrate your goal, investment process and/or competitive standing
- Vary the types of information to create interest
- Add colors and lines to focus the client's attention

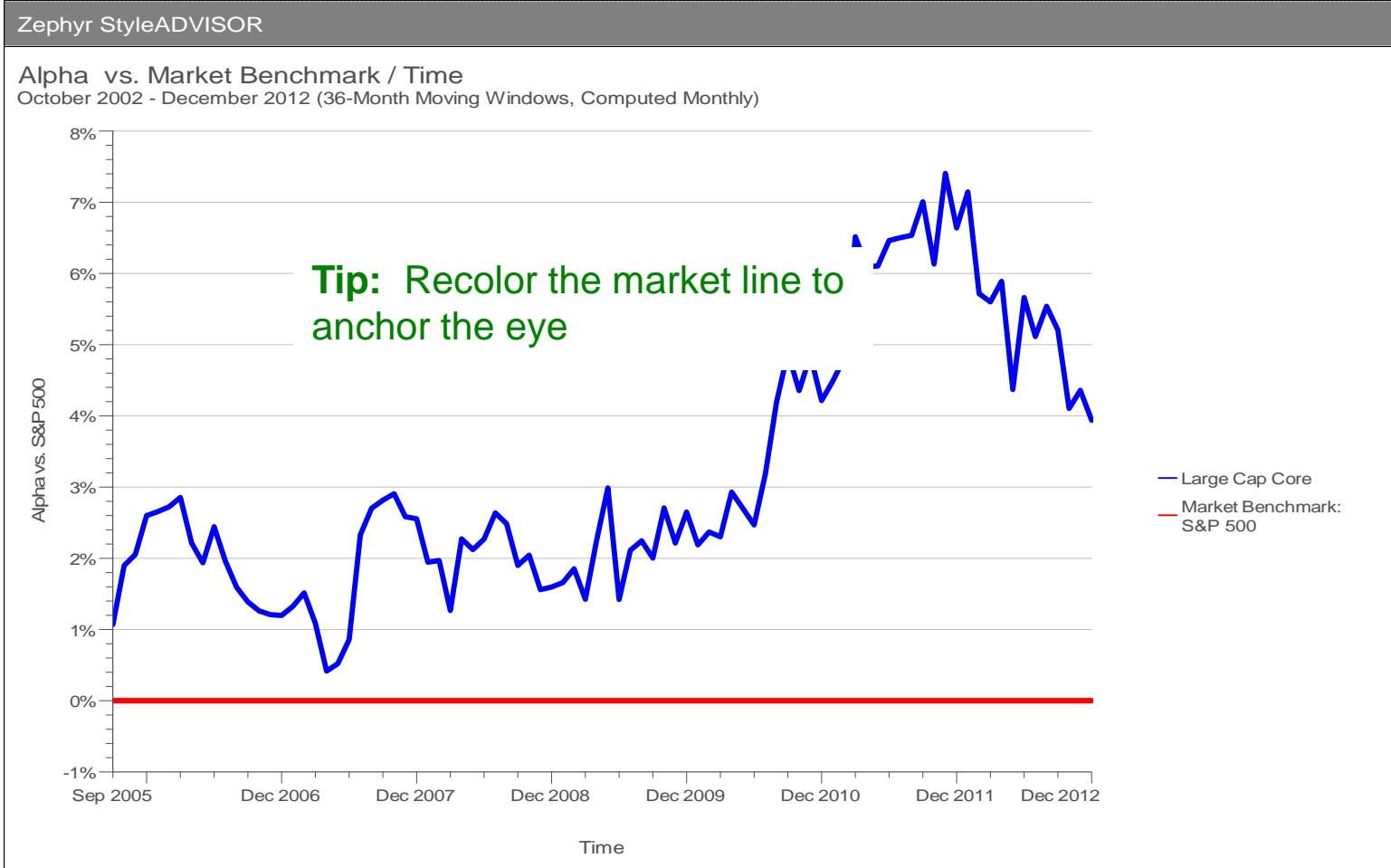
Vary the information: A strong graph



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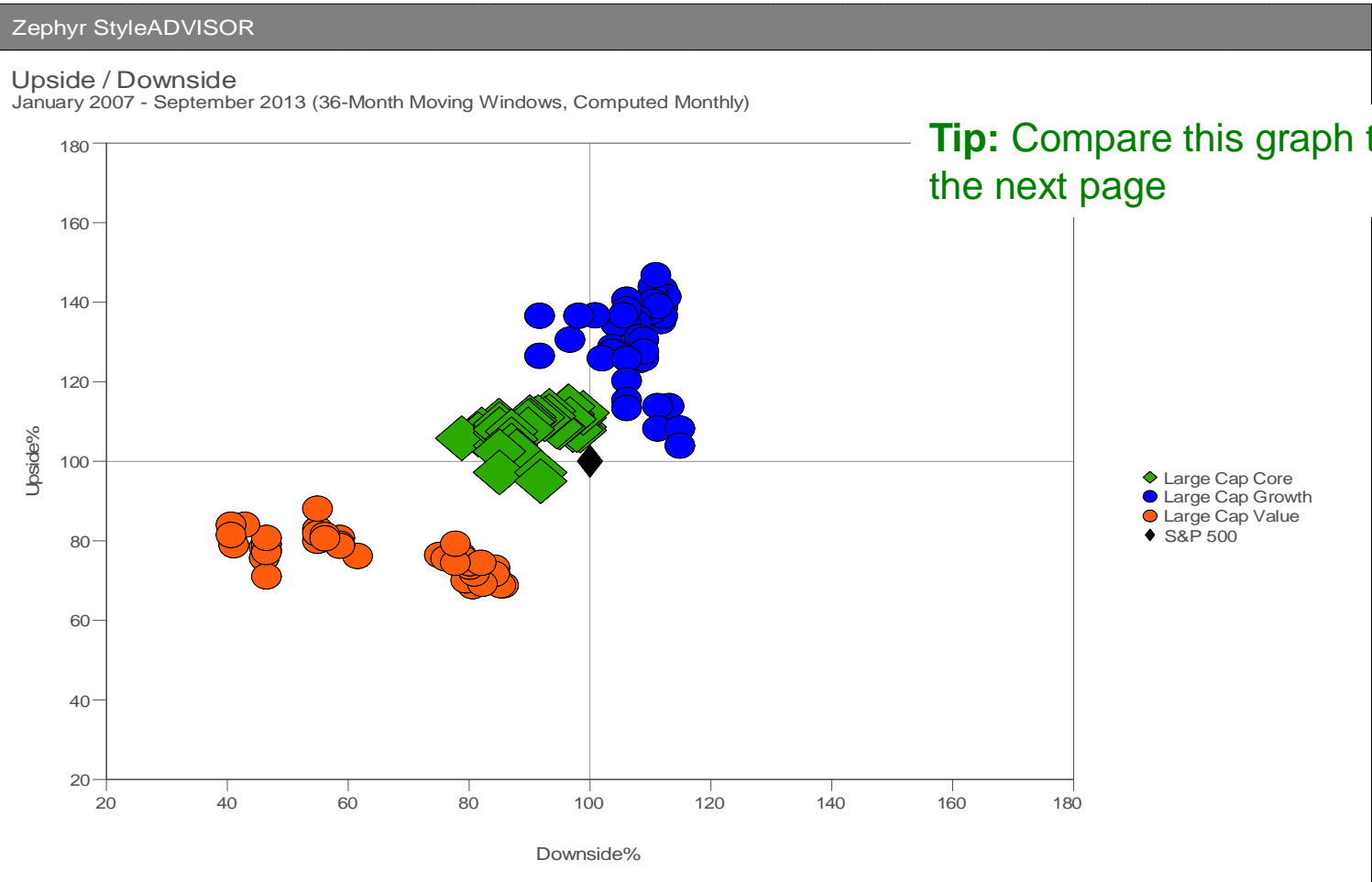
Improve a graph with color



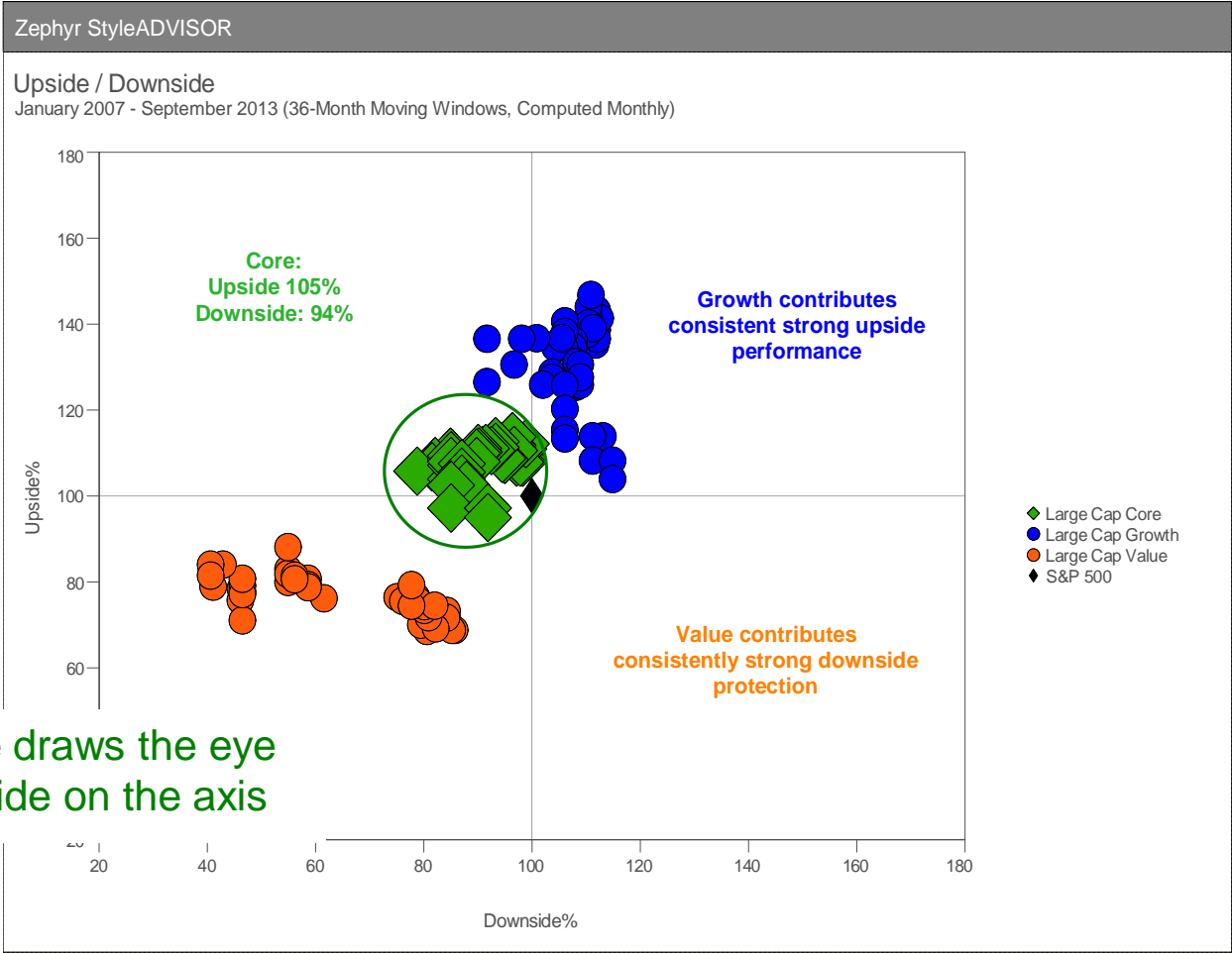
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Use of color and shape

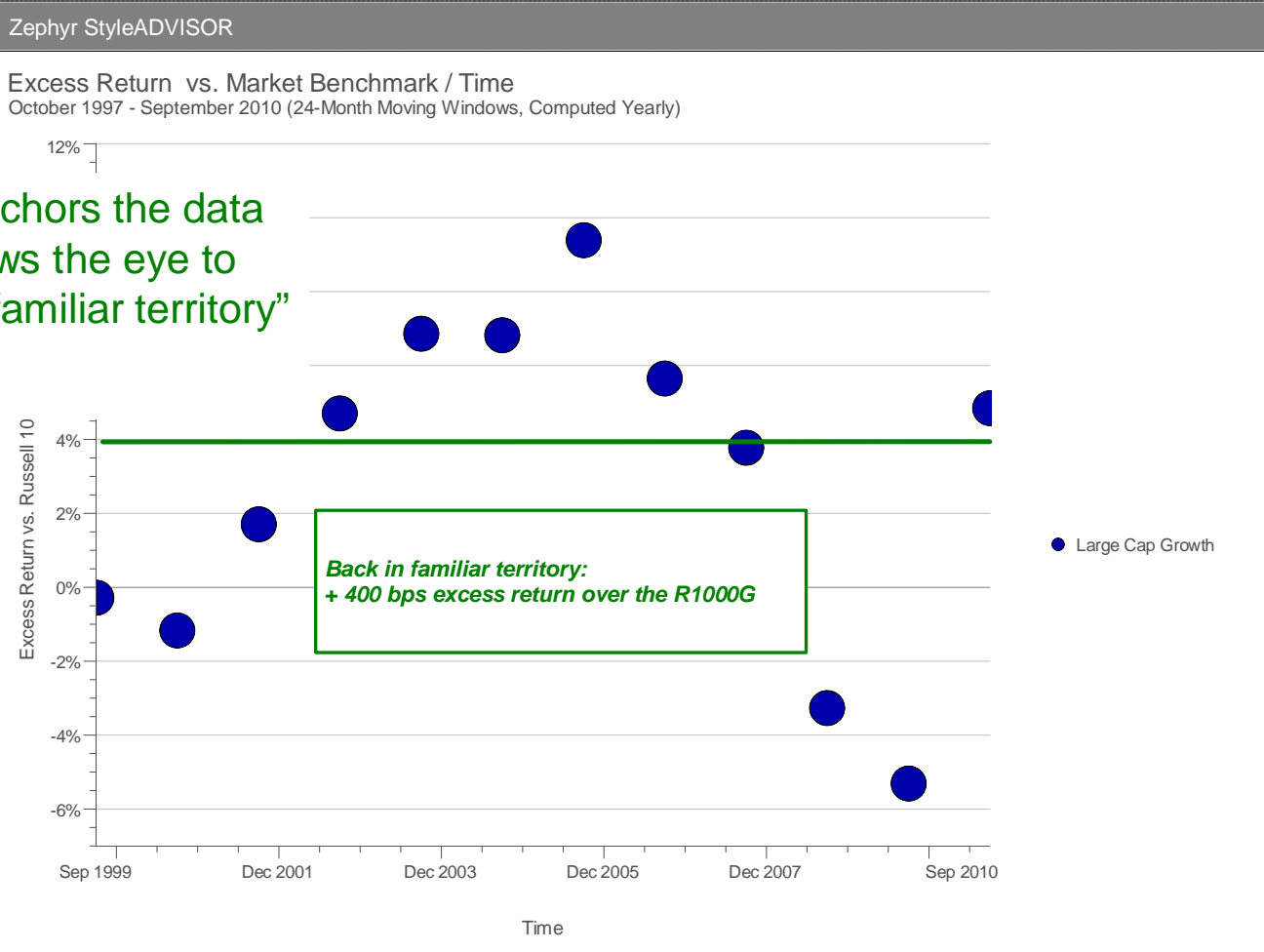


Circles draw the eye to data



Tip: The circle draws the eye to 80% downside on the axis

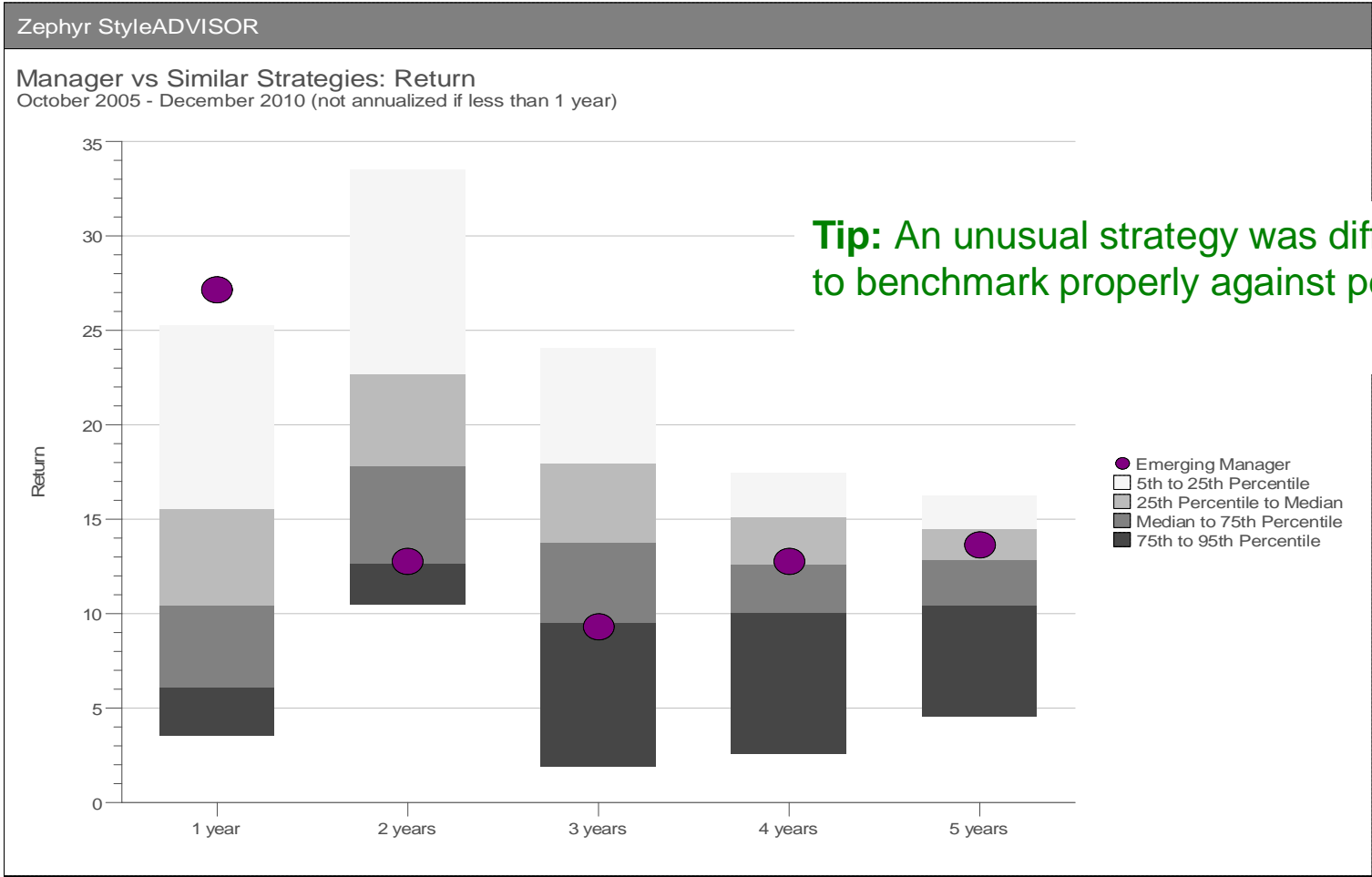
Lines focus attention



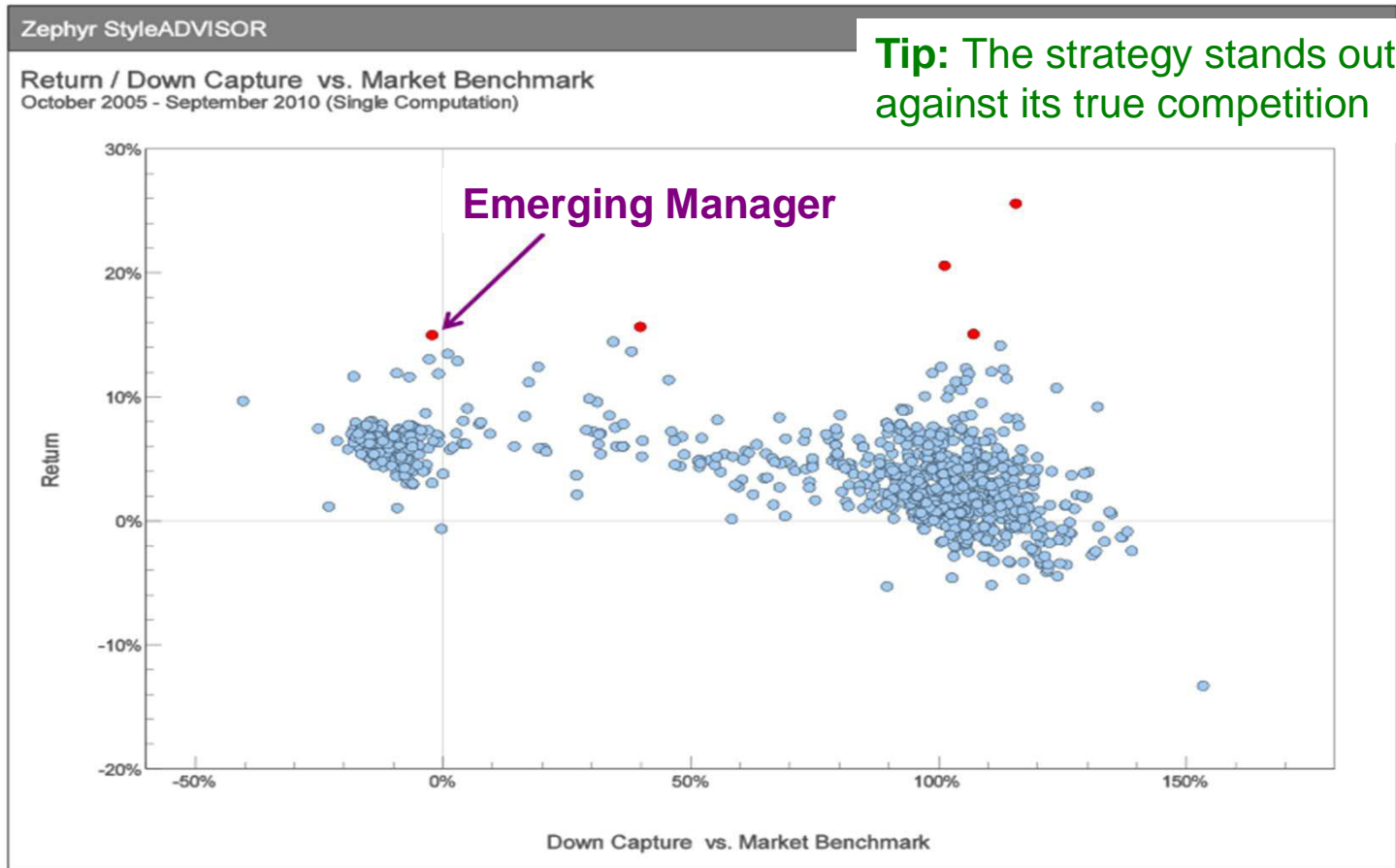
Use StyleADVISOR to dig deeper

- Review all statistics, graphs and tables
- Is it what you expected?
- Do related research for insight:
 - Vary the time periods
 - Change the benchmark
 - Change the peer group
- Identify as many negatives as possible and respond in one or two sentences

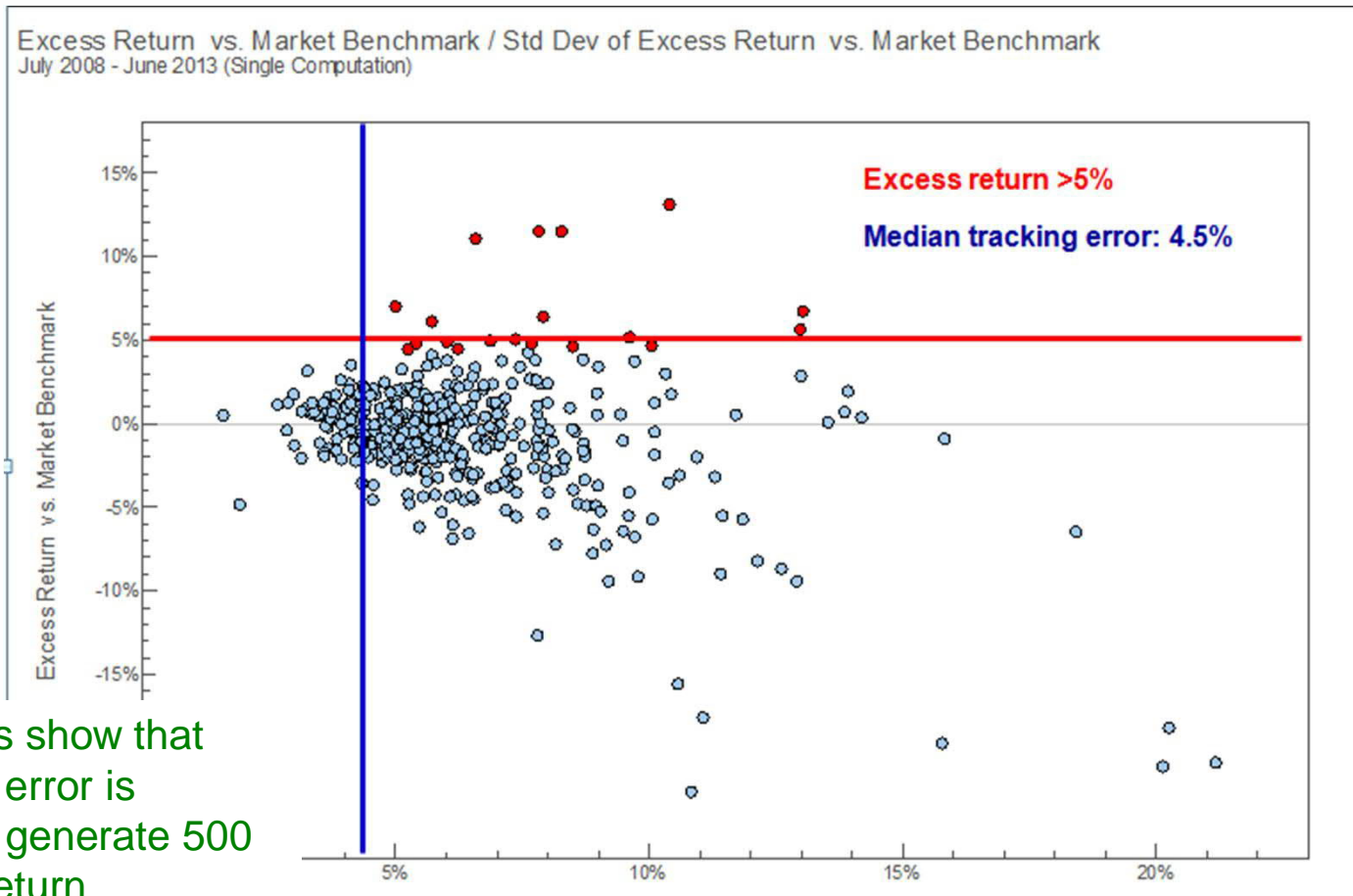
Emerging manager with unusual strategy



Vary the peer group



Address a perceived negative



Tip: The lines show that high tracking error is necessary to generate 500 bps excess return

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5 Tips for a Compelling Presentation

- **Articulate** the company's investment value proposition
- **Reframe** some aspect of the process to define a unique category
- **Reinforce** the message using charts and graphs
- **Reflect** the company's personality
- **Make sure it cannot be copied**

Define your edge

StyleADVISOR + Creativity = Outstanding Presentation

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Thank you!

Deborah G. George

President, GEMS

631.675.1600

DGeorge@GeorgesGEMS.com

[**www.GeorgesGEMS.com**](http://www.GeorgesGEMS.com)

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