

YCharts for Wholesalers: Key Insights and Impact

Wholesalers using YCharts report accelerated deal closures, improved competitive positioning, significant time savings, and enhanced advisor engagement through data-driven insights.



Client Satisfaction & Longevity

- **Every single wholesaler** who has used YCharts for 5+ years rates it **as above average** or **best in class**.
- **8 in 10 wholesalers** agree that YCharts is better or significantly better than other research tools.

Sales Cycle & Business Growth

- **8 in 10 wholesalers** agree that YCharts helps **close deals faster**.
- On average, wholesalers using YCharts attributed more **than a quarter of new business in 2024** to using YCharts, and for long-term users (5+ years), that number climbs to **nearly a third**.

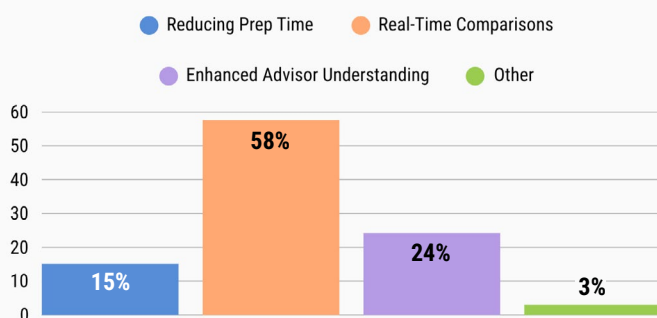
Average Percentage of New Business Attributed to YCharts in 2024



● Remaining Business ● Business Attributed to YCharts

- **Eight in 10 wholesalers** agree that using YCharts for **real-time comparisons** or to **deepen advisors' understanding** of their strategies shortens their sales cycle.

How Does YCharts Primarily Help Shorten Your Sales Cycle?



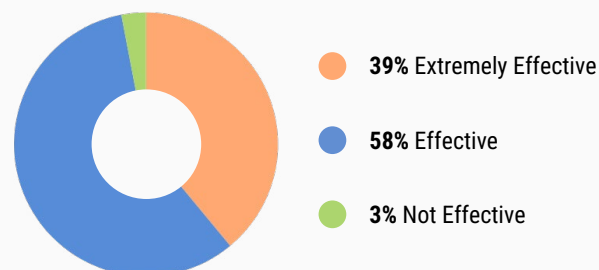
Time Savings

- Wholesalers and asset managers **save the equivalent of 10 full workdays every month** by using YCharts compared to prior or no tools.
- For wholesalers who have been clients for over five years, that increases to **over 13 workdays saved per month**—more than half a month's worth of time back!

Presentation & Competitive Differentiation

- **97% of wholesalers** find YCharts to be effective in positioning their funds.

How effective is YCharts in helping you position your fund(s)?



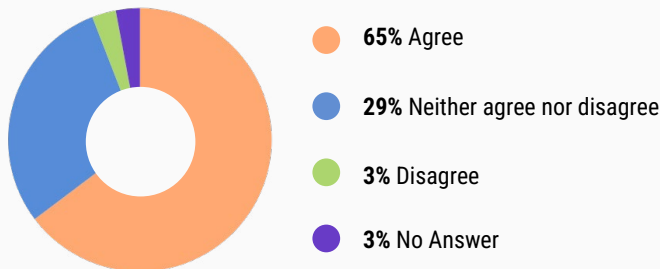
- **9 in 10 wholesalers** find YCharts valuable for **competitive analysis and strategy comparison**.
- **9 in 10 wholesalers** also agree that YCharts helps them present data and visuals in a way that **resonates with advisors**.



Source: YCharts 2024 Client Survey

- **Two-thirds of wholesalers** agree that YCharts helps **handle advisor questions on the spot**, making them more confident in every conversation.

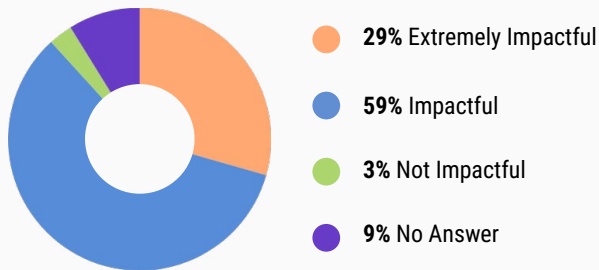
YCharts Helps Handle Advisor Questions on the Spot



Most Valuable Features in Advisor Meetings

- **88%** of wholesalers agree that YCharts visuals keep advisors engaged during meetings.

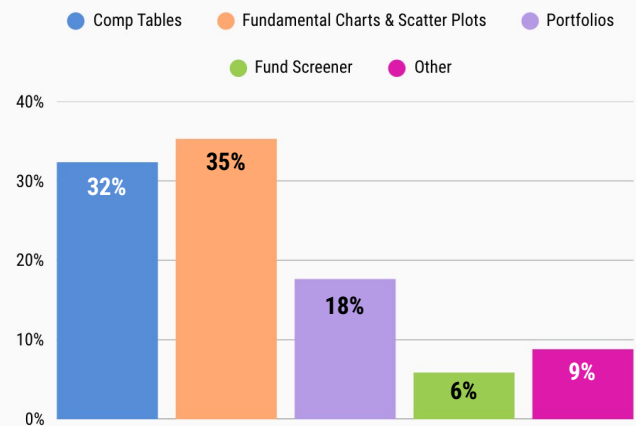
How Impactful Are YCharts Visuals in Keeping Advisors Engaged during Meetings?



- **More than one-third** of wholesalers use **Fundamental Charts and Scatter Plots** as their go-to solution for explaining complex data to advisors.
- **Comp Tables** follow closely behind, with **nearly one-third of wholesalers** relying on them for streamlined comparisons.

- **Portfolios** round out the top three solutions, with nearly **1 in 5 wholesalers** using them to present allocation strategies, blended hypotheticals, and/or consult on model portfolios.

Which YCharts Feature Has Most Contributed to Your Success in Advisor Meetings?



Team Alignment & Standardization

- Keeping teams on the same page is crucial, and **more than two-thirds of wholesalers** say the biggest benefit of YCharts dashboards is **standardized data presentation** across their team.
- **Another quarter** agree that the YCharts Dashboard **enhances collaboration**, making it easier to align insights and strategy across teams.

Source: YCharts 2024 Client Survey