

Timing Is Everything in the Allocation Process!

As markets move, investor mandates change. Fund managers need to be aware of mandate changes that can move them into a favorable position for allocation.

Fund managers typically confine their searches to specific categories of investors. As a result, they often end up contacting investors who may no longer be a match for their fund while excluding those investors whose mandates have recently changed to favor their strategy. The value of the BHA investor network is that we track changing investor mandates, giving our clients access to ALL global investors who are *currently* searching for their type of fund.

Any investor type can alert our analysts that they have recently changed strategy and NOW are seeking a NEW strategy to invest in. When an investor mandate changes, BHA can provide a fund manager with a significant advantage by alerting that manager to the new opportunity, allowing her to be in the right place at the right time to secure an allocation.

Our clients have told us that once they came on board, they quickly became aware of the shortcomings of the lists and databases they formally used in comparison to the compiled work of a team of twenty analysts whose job is to collect fresh, timely, in-depth investor information.

This isn't just rhetoric. We actually prove this to our clients by updating their previous investor lists and databases when they sign up. We do this by creating a secure partition within our network where new clients can upload their database or excel list. From there, we sort and cross-reference the list with the investors from our live network, updating the stale and out-of-date records as we find matches.

Brighton House analysts maintain this live, fresh network of investor leads by fostering relationships with investors everyday on the phone and in person at more than 30 industry conferences throughout the year. We frequently hear investors say they are happy to talk with our analysts and become part of our network because we are an unbiased third party whose priority is not to sell a product or pitch a fund, but rather to make matches that are beneficial to both managers and investors. It is our goal to eliminate wasted time and energy on the part of both managers and investors by providing leads that are highly accurate and up-to-date.

Our team works very hard to ensure that our fund managers talk to the right investors at the right time. At Brighton House, we bear the burden of finding the appropriate investors, so that our managers can devote their time and energy to selling their funds and securing allocations.