

CFRA Fact Sheet

CFRA is a global and leading provider of institutional-grade independent research. Through sophisticated forensic analysis and broad fundamental equity and fund research, CFRA empowers sophisticated investment professionals, advisors and risk managers with actionable ideas and proven results. CFRA's global clients include the world's leading institutional investors, wealth advisors, insurance companies, regulators, and other corporations. For more information, visit cfraresearch.com

Fast Facts

- » **Founding:** 1994
- » **Locations:** Six offices in four countries
- » **Employees:** Approximately 100
- » **Headquarters:** New York City
- » **Leadership:** Peter de Boer, CEO
- » **Ownership:** Privately Held

Clients

- » 10 of Global Top 20 Hedge Funds
- » 4 of Global Top 5 Mutual Fund Companies
- » 12 of Global Top 20 Wealth Management Firms
- » 8 of Global Top 10 Online Brokers
- » 3 of Global Top 5 Pension Funds
- » 3 of Global Top 5 D&O Insurance Underwriters
- » 2 of Global Top 4 Accounting Firms
- » Global Regulators
- » Hundreds of Corporations, Academics and Libraries

CFRA Fact Sheet (cont'd)

Offerings

- » **Market Research:** Weekly market commentary, sector insights, and portfolio guidance
- » **Sector and Industry Research:** Robust analysis covering 11 sectors and 42 industries
- » **ETF and Mutual Fund Research:** Unique holdings-based analysis covering 1,860+ ETFs and 22,000+ Mutual Funds
- » **Company Research:** Qualitative coverage of 1,500+ companies; quantitative coverage of 20,000+ global companies
- » **Portfolio Risk Monitoring:** Diagnostic industry and company monitoring for risk assessment
- » **Differentiated Idea Generation:** Investigative insights utilizing forensic accounting, legal and exception-based insights

Company Timeline



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