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MATRIX

INTELLIGENT MARKET INSIGHTS,
ACROSS YOUR PRODUCT LIFECYCLE



Introduction to Matrix

Matrix is a financial research solution that has been designed to help you easily analyse products and propositions within the market through current and historic data. Helping to inform your decisions around design and promotion throughout the product lifecycle, giving you a competitive advantage.

Whole of market data

Defaqto collects comprehensive data on over 30,000 products from the banking, insurance and investment markets. In addition to this market data, we also rank offerings using our unique Data Numerical Analysis (DNA) system. Matrix allows you to filter results based on

features, performance or DNA scores, so you can easily create market-leading propositions. Our 60 analysts spend 400 hours a day updating our data, independently scoring every product, investment, feature and benefit. These robust processes mean that you'll always have up-to-date information that you can rely on.

Insight across your product lifecycle

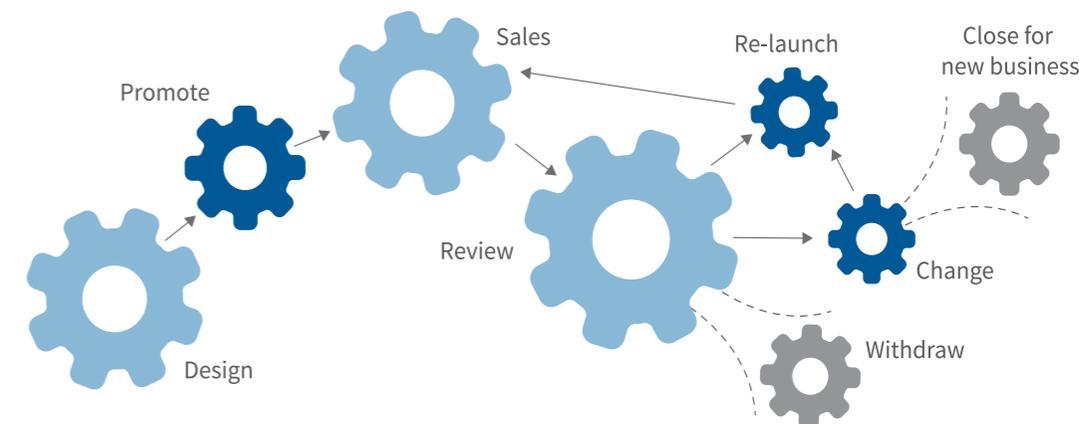
Matrix supports every step of your product lifecycle by delivering up-to-date, comprehensive and accurate market data, allowing you to design unique, best-in-class, customer centric propositions.

Design – Matrix provides insight to your product design or investment management teams, so you can see exactly where a product or proposition will sit within in the market, and benchmark it against your competition prior to launching. You can also access historic data that will assist in identifying trends that may impact design decisions – helping to create a compelling proposition to launch to market.

Small print – Underwriting teams can leverage the brochure text data stored within Matrix to quickly and easily compare competitor's terms and conditions, inclusions and exclusions to inform the small print decisions.

Promotion – Product and marketing teams can craft powerful messages driven by factual data to identify your product's unique selling points. These key messages can then be used in external communications or by sales teams – supporting you in conveying the value of your proposition to the market.

Review – Once launched in the market you can schedule regular reports to monitor changes on competitive offerings. This insight will allow your design teams to respond quickly to changes, evidenced by independent market data, to keep your products or propositions competitive and allowing you to stay ahead of trends and your competition.



Streamline your research

The financial product market is constantly evolving, new products are introduced and existing ones are changed or withdrawn every day. Researching the market is a time-intensive process and as soon as it's completed, products, features or even rates may have changed – making your information out of date. Keep up to date of any market changes with Matrix:

- A single point of market information – save time researching and formatting data, allowing you to focus on analysis and proposition design
- Create bespoke reports to visually compare data
- In addition to the headline information you can drill into the brochure text to understand the detail of the product and any inclusions and exclusions
- Identify threats and opportunities quickly by using factual data to help you change your offering and craft new messages
- Monitor and appraise the competitiveness of your product
- Whole of market data, 100% independent and updated daily
- Web based access supporting flexible working policies

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“We use Defaqto Matrix regularly. It allows us to quickly and easily assess at a high level the product features and functionality available across the industry. It can help illustrate gaps in the market and opportunities for product development, which ultimately is to the benefit of our own customers.”

Andy McGeown, Platform Marketing Manager, Old Mutual Wealth



Matrix at a glance

- Comprehensive data on over 30,000 banking, insurance and investment products
- Intuitive and easy-to-use with filters to help you quickly access the information you need
- Easily generate charts, tick box or brochure text comparison tables
- Access historic data as far back as November 2009, and identify trends
- Gain training and support to help you get the most out of the Matrix system
- Licensing based at user level so administrators can control usage
- Create simple but effective change reports that can be saved, exported, scheduled and emailed, making sure you're constantly ahead of the competition

About Defaqto

Defaqto is a financial information business, helping financial institutions and consumers make better informed decisions.

Our independent fund and product information helps banks, insurers and fund managers with designing and promoting their propositions. We analyse more than 30,000 financial products in the UK. These products change on a daily basis, and our customers need help with keeping track of this.

We have been doing this for over 20 years, and we have 60 analysts spend 400 hours a day monitoring the market. They ensure that the information we provide is accurate and up to date. Our experts have done all the hard work so that financial institutions and consumers can make better informed decisions.

1. Collect	2. Analyse	3. Create	4. Support
We collect financial data from across the whole market.	We use our expertise and insight to analyse this data and make it comparable.	We create a range of products and services to deliver this information in a meaningful way.	We help consumers make better financial decisions and help the finance sector create, manage and distribute products.



“Defaqto Matrix gives us an indication of how the competitor landscape is changing, we can then use this insight as part of our thought process to shape and review our product and proposition. Having this information readily available, in easy to read formats, means we save time and valuable resources.”

Paul Hampton, Technical Motor Underwriter, esure



Want to know how Matrix can provide market insight to your teams?

Get in touch to request a demo:



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www.defaqto.com/provider

Please contact your Defaqto Account Manager
or call us on 0808 1000 804

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