We’ve added new features to our advanced searches, making it even faster to get the most relevant data and analysis.

**Example:** Aggregated analysis from the search results for buyout investors in the B2C industry.

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**Search**

1. Click on the “Investors & Funds” advanced search tab.
2. Select the investor type.
3. Select the appropriate deal type.
4. Select the desired industry.
5. Run the search.

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**Results**

1. View funds, companies, and deals associated with the chosen deal criteria.
2. Use custom templates and filters to quickly see the most relevant data points.
3. Add columns to further customize the template.
4. Drag and drop columns to customize the layout on the fly.
Tips & Tricks

What’s New in the Investor Advanced Search

Questions? Contact your account manager Ian Winner at (206) 257-7830

Analytics

1. Click on the “Analytics” tab to get detailed, aggregated statistics.
2. Add additional filters to focus on the most relevant data.
3. Add relevant values and metrics to the table.
4. Remove irrelevant metrics by clicking on the gray delete buttons.
5. Click through on the data to get the list of underlying funds and their individual returns data.

Charts

1. Click on the “Charts” tab to get presentation-ready, customizable charts.
2. Add filters to focus on the information that is most relevant.
3. Choose from a variety of chart types to represent the data in a number of ways.
4. Control which information goes on the X and Y axes for full customization.
5. Download the charts into Excel to put directly into pitchbooks or presentations.