

MarketScope Advisor

CFRA provides financial advisors with access to extensive market commentary, independent investment analysis, and up to date news and data on a broad range of asset classes.



**Independent
investment analysis**



**Extensive market
commentary**



**Up to date analysis
and insights**

INDEPENDENT AND ACTIONABLE RESEARCH

CFRA's essential analytical tools help investment professionals stay on top of changes in the markets so they can make informed investment decisions, track strategies to maximize returns, and deliver clear investment insights to their clients.

The Outlook

Weekly newsletter

- Timely, proven guidance on market behavior, its driving forces, and how a portfolio can benefit
- CFRA Investment Policy Committee Weekly Notes, including asset allocation recommendations
- Weekly articles on investment, market, and economic themes
- Comprehensive industry coverage

Model Portfolios

20 stock and ETF portfolios

- Model portfolios based on CFRA's unique qualitative parameters and proprietary quantitative stock selection methodologies
- Includes 5 ESG models

Industry Surveys

68 industries and 11 sectors

- Quickly identify an industry's key drivers, surveys provide broad fundamental overviews, recent performance statistics, and analysis of trends
- Published twice annually

Stock Research

Qualitative

- 1,650+ global companies
- Buy, hold, sell recommendations
- Price targets
- STARS rankings
- Research Notes

Quantitative

- 12,000+ global companies
- Buy, hold, sell recommendations

ETF & Mutual Fund Research

Unique holdings-based analysis

- 3,300+ ETFs
- 15,000+ mutual funds
- STARS rankings
- Sub-category scores for Reward, Risk and Cost to assess a fund's position relative to peers
- Proprietary forward-looking analysis, more predictive in nature

MarketScope Advisor

GAIN CLEAR INSIGHTS TO INFORM YOUR INVESTMENT STRATEGY

CFRA research on MarketScope Advisor is updated throughout the day and contains robust information that is both powerful and easy to use and interpret. Our analytical tools make portfolio development and monitoring easier, with screening, model portfolios, as well as watchlists and alerts to help you deliver clear investment insights to your clients.

Screening & Workflow Tools

Screen stocks, ETFs and funds and generate quality investment ideas that align with your clients' objectives.

Watchlists

Create customized, easy-to-monitor lists of stocks, funds and ETFs.

Alerts

Set alerts to receive email notifications when new research is published.

NEWS, COMMENTARY, AND RESOURCES FOR INVESTORS

CFRA research on MarketScope Advisor is updated throughout the day and contains robust information that is both powerful and easy to use and interpret. Our analytical tools make portfolio development and monitoring easier, with screening, model portfolios, as well as watchlists and alerts to help you deliver clear investment insights to your clients.

Analysts Access & Education

Conference calls, webinars and educational seminars developed for financial advisors and individual investors.

Broker Views and News

Commentary on companies from experienced brokers and dealers.

Economy Watch

Current economic data including housing starts, factory orders and consumer sentiment.

Investment Strategy

Exclusive asset allocation recommendations and commentary from CFRA's Investment Policy Committee.

Thematic Research

In-depth articles written by CFRA's analysts and strategists focusing on sector, industry, and market trends to support actionable idea generation.

Market Movers

Current information on active stocks that could impact your clients.

For more information about CFRA's research, contact us:
1.800.220.0502 or visit us at cfraresearch.com