FundFinder FAQ

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What is the difference between FundFinder and FundFinder Pro?

FundFinder is Barclay's free online fund search and analysis tool, made available to registered members to BarclayHedge.com. Start FundFinder now.

FundFinder Pro is the enhanced upgrade of FundFinder that is activated with any purchase of a subscription to a BarclayHedge database. ***Pro*** users can:

- Access all the inactive or dimmed fields that are not available in FundFinder
- Utilize a more comprehensive Portfolio Calculator
- View more data and preprogrammed analysis for each fund or program in the fund profile
- Refresh their data-set in real-time

For a free demonstration of FundFinder Pro, contact Richard Rubin at rrubin@barclayhedge.com or +1 (641) 472-3456 x112 between 8:00am and 5:00pm CST.

Learn more about the BarclayHedge databases.

How do I search for hedge funds or CTA programs by strategy?

1. From the "Search" tab, choose a fund type: Both, CTA, or HF.
   NOTE: You may be prompted to log in. If you are not a Registered User, follow the directions for a "Free Member Registration."
2. If applicable, select any General Filters.
3. Under Portfolio Type, select the investment strategies that interest you.
   - For Hedge Funds, if you want to search for all strategies the funds use, uncheck "Only Search Primary Strategy (HF Only)".
   - For CTA's select any one of the options under the "CTA Strategies" section.

   A summary of your search will appear at the bottom of the "Search" page.
4. Refine your search by making selections under the Statistics, Detail and Correlation tabs.
5. Click the Gold "Search" button at the bottom of the page to see a table of search results.
6. From here you can:

  - Click on any fund or program name and see a detailed profile, containing the fund Snapshot, Performance, Statistics & Risk, Fund Info, Trading, Admin, Manager Info, Contacts, and Awards.
  - Plot the VAMI chart that compares the fund's performance against the S&P 500, the Barclay Hedge Fund Index or the Barclay CTA Index for your specified time window.
7. Return to your results table by clicking the back button on your browser.
   NOTE: At this point you may choose to create a Quicklist, select funds to correlate against a fund or benchmark, use the Portfolio Calculator, save your search, or export the results spreadsheet.

How do I rank hedge funds or CTA programs with FundFinder?

1. Starting from the "Search" tab, select the types of funds that interest you most, and click the Gold "Search" button.
2. From the table of search results, mouse over any column heading to either sort from the default criteria, or select a different criteria from the drop-down menu.
   NOTE: Most options in the drop-down menu are available only through **FundFinder Pro** – Barclay's enhanced data analytics platform that accompanies all database subscriptions.

How do I search for a hedge fund or CTA by name?

1. From the "Search" tab, type the first part of the fund or program name (at least 4 characters) into the Search Name box. If necessary, type more of the name until the fund(s) or program(s) appear.
   A list of matching funds or programs including the primary search strategy pops up.
2. Click the Gold "Search" button to see a table of your search results.

How do I create a Quicklist?

1. Once you've obtained your desired table of Hedge Fund or CTA results, click the "[+]" next to the fund name to add it to the Quicklist.
   NOTE: You must have at least three funds in the Quicklist to use the Portfolio Calculator.
2. A "Quicklist- Toolbox" pop-up window will appear.

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How do I analyze my custom portfolio?

NOTE: Before you can use the Portfolio Calculator, you must create a Quicklist.

1. From the "Quicklist" window, click the "Portfolio Calculator" button.
   The Portfolio Results page appears.
2. Adjust the portfolio start date and end date.
3. Click the Gold "View Portfolio" button to see your portfolio results.
   The portfolio's performance is shown, with monthly, quarterly and annual changes.
   Under Portfolio Details you'll see performance statistics including return statistics, wins and losses, best and worst 12-month periods, and correlations against the Barclay, Efficiency, Sharpe, Sortino, and Sterling Ratios.
4. Save your portfolio by clicking the "Save Portfolio" link located at the top left side of the Portfolio page.
5. Return to the portfolio results by clicking the "Back" button on your browser.

How do I correlate a fund or program against another fund or benchmark?

NOTE: Before you can use the Correlation Calculator, you must create a Quicklist.

1. From the "Quicklist" window select one of the funds and click the "Correlation" button.
   The Correlation Results page appears. The funds on your Quicklist are correlated against your selected fund.
2. To correlate the funds against one of approximately 70 benchmarks, select a benchmark from the drop-down menu and click the Red "Correlate Against Benchmark" button to see the results.
3. Return to the portfolio results by clicking the "Back" button on your browser.