



IHS Markit is excited to announce some radical enhancements to our market-leading research evaluations and interaction management solution, "Evaluation". These enhancements in the rate card management module build on our 15-year legacy of designing flexible and adaptable Research Evaluation & Payments solutions for asset managers, broker-dealers and research service providers.

## Rate Card Management

We call it "The New Global Best Practice". Since Mifid II, asset management companies around the world, whether in Mifid II scope wholly, partially, or not at all, have been adapting and improving their processes and systems around research evaluation and payments.

## Highlights

The rate card management features outlined in the case study are just a few examples of the enhancements we have rolled out this year, and which are made available to all our institutional clients. Further enhancements include:

- Manage, apply rate card settings to one, more than one, or all Service Providers via Platform or excel
- Set rates to portfolio manager attendees individually or split evenly across a group of portfolio managers
- Allow portfolio managers to view interactions during a formal evaluation or restrict that view.
- Include or exclude interaction consumption data from final Service Provider rankings and scorecards
- View rate card details for each interaction and apply retrospective rate card settings to previously uploaded interactions

For further information on our Research Evaluation & Payments and Corporate Access Event Management Services for Institutional Investors, please click [here](#).

[CLIENT CASE STUDY](#)

