



## EPFR and Caretta Data Deliver Holistic View of Long/Short Equity Positioning

*Strategic alliance offers buy-side and sell-side professionals, central banks and quants insight into investor sentiment, and tools to make more informed investment decisions*

**Boston, MA – (July 21, 2020)** – [EPFR](#), a subsidiary of Informa plc (LSE: INF) and worldwide industry leader in providing fund flows and allocation data to financial institutions, has formed a strategic alliance with [Caretta Data](#), a consolidated source for institutional ownership and short positioning data, to offer financial professionals detailed insight into managers’ long and short equity positions for more accurate price position forecasts.

EPFR is the global leader in tracking capital flows through mutual funds and ETFs, with its datasets measuring equity flows that reflect long managers' sentiment. Caretta Data, and its proprietary technology which analyzes short position data, offers an inverse view with analysis around short managers’ outlooks. Together both companies aim to generate a more holistic view on stocks to help users execute smarter investing decisions.

“The interplay between EPFR’s daily stock flows and Caretta’s daily short positioning data make this alliance a natural fit,” said Todd Willits, Head of EPFR. “Together, we can help clients understand market volatility, find better directional signals, and make more informed decisions in both rising and falling markets.”

Users of the new dataset can screen stocks, manage risk, monitor market sentiment, benchmark against their peers, time the market and conduct quant research. Buy-side professionals can leverage these insights as an alpha generation tool for more timely market entries and exits, while sell-side professionals will obtain a greater understanding of pricing pressure for stronger execution as market makers. Additionally, Central Banks and Quants can use it as a risk indicator in highlighting short positions being built up in sectors, countries or individual stocks with systemic market risk.

“We’re beyond excited to partner with EPFR and deliver clients a more well-rounded solution,” said Adam Longenecker, Founder of Caretta Data. “We feel this combination will generate views on stocks that lead to better forecasts of price movements.”

For additional information, please visit: <https://financialintelligence.informa.com/products-and-services/data-analysis-and-tools/epfr>.

### **About EPFR:**

EPFR, a subsidiary of Informa plc (LSE: INF), provides fund flows and asset allocation data to financial institutions around the world. Tracking over 100,100 traditional and alternative funds domiciled globally with more than \$34 trillion in total assets, we deliver a complete picture of institutional and retail

investor flows and fund manager allocations driving global markets. Our market moving data services include daily, weekly and monthly equity and fixed income fund flows and monthly fund allocations by country, sector and industry. For more information, please visit

<https://financialintelligence.informa.com/products-and-services/data-analysis-and-tools/epfr>.

**About Informa Financial Intelligence:**

Financial Intelligence, part of the Informa Intelligence Division of Informa plc, is a leading provider of products and services helping financial institutions around the world cut through the noise and take decisive action. Informa Financial Intelligence's solutions provide unparalleled insight into market opportunity, competitive performance and customer segment behavioral patterns and performance through specialized industry research, intelligence, and insight. For more information, please visit <https://financialintelligence.informa.com>.

**About Caretta Data:**

Caretta Data is an innovative company using state-of-the-art technology to collect, consolidate, and analyze global long/short ownership data. Founded by quants, our datasets have global coverage, deep history, and are formatted for outrageously easy analysis. Clients use our data to screen for crowded stocks, manage risk, and benchmark themselves vs their peers. For more information, please visit <https://www.caretta.io/>.

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