

Industry Veteran Launches Fitzcores, a Best-In-Class Global Institutional Investor Targeting Solution

Founded by Brendan Fitzpatrick, CFA, a pioneer in the investor targeting field with over 25 years of experience, Fitzcores sets the bar for accuracy, transparency, and usability.

CARY, NC / ACCESS Newswire / March 19, 2024 / Fitzcores – Fitzcores LLC today announced the launch of Fitzcores, an online targeting solution for corporate investor relations. Fitzcores applies an unprecedented level of insight to surface targets directly to the user. Effective use of the solution requires no industry experience, minimal training, and no service tie-ins.

Fitzcores analyzes an array of security attributes to rank institutions and funds based on their likelihood of initiating a stock position. Rigorous back-testing demonstrates that the most highly qualified portfolios – based on Fitzcores metrics – are 7 to 30 times as likely to initiate a stock position compared to a random portfolio. In addition, companies can see for themselves the very high correlation between Fitzcores and their shareholders.

“For decades, the corporate access market has been underserved in the area of institutional investor targeting, especially given the high priority investor relations officers assign to the initiative year after year,” Fitzpatrick notes. “For too long, broker commissions, exchange subsidies, product bundles, and incorrect assumptions about how portfolio managers invest have hindered competitive development in this important area. Smaller companies especially have been left to fend for themselves.”

Smaller companies with “low to moderate analyst support” are particularly challenged to identify qualified institutional investors to meet with and are “at greater risk of accepting meetings that are unlikely to produce results,” says Fitzpatrick.

Seasoned Investor Relations Officer, Clay Bilby (IRC), reasons, “The opportunity cost for a day of investor meetings with your CEO or CFO can range from \$5,000 to \$20,000. Given this dynamic, the job of the IRO is to schedule meetings with investors who are most likely to initiate or increase a position in their stock. Fitzcores identifies those investor targets which are the best fit for your company’s unique financial

profile. Further, back-testing provides the proof points for the methodology, making this the most empirically sound approach to institutional investor targeting available.”

–Clay Bilby, IRC, former IRO at Palo Alto Networks and Keysight Technologies

About Fitzcores

Fitzcores – available online or by API feed – is the only independent, single-purpose online targeting solution currently available in the market. Its founder, Brendan Fitzpatrick, has over 25 years of experience systematically analyzing investment behavior and is widely regarded as a pioneer in the field. Learn more by visiting fitzcores.com.

Contact

Brendan Fitzpatrick, Founder

Email: bfitz@fitzcores.com

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