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Epoch Investment Partners, Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

Epoch Investment Partners, Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Epoch Investment Partners, Inc. and its competitors. This provides our Clients with a clear understanding of Epoch Investment Partners, Inc. position in the Industry.

The report contains detailed information about Epoch Investment Partners, Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Epoch Investment Partners, Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Epoch Investment Partners, Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and

company's long-term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Epoch Investment Partners, Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Epoch Investment Partners, Inc. business.

About Epoch Investment Partners, Inc.

Epoch Holding Corporation operates as a holding company for Epoch Investment Partners, Inc. (EIP). It provides investment advisory and investment management services. EIP provides services for retirement plans, mutual funds, endowments, foundations and high net worth individuals.

Operations and Products

As of June 30, 2007, EIP offered various separate investment products to its clients, including - U.S. All Cap Value; U.S. Value; U.S. Smid (small/mid) Cap Value; U.S. Small Cap Value; Global Small Cap; Global Absolute Return; International Small Cap; Balanced Portfolios; and Global Equity Shareholder Yield.

U.S. All Cap Value: This product comprises a range of U.S. companies with market capitalizations that resemble stocks in the 'Russell 3000', a U.S. Equity index which measures the performance of the 3,000 major U.S. companies based upon total market capitalization.

U.S. Value: This product reflects a selection of equities in U.S. companies with market capitalizations generally considered to be comparable to the 'Russell 1000', a U.S.

Equity index which measures the performance of the 1,000 major companies in the Russell 3000 index.

U.S. Smid (small/mid) Cap Value: This product comprises U.S. companies with capitalizations generally considered to be comparable to the 'Russell 2500', a U.S. Equity index which measures the performance of the 2,500 smallest companies in the Russell 3000 index.

U.S. Small Cap Value: This product comprises U.S. companies with capitalizations generally considered to be comparable to the 'Russell 2000', a U.S. Equity index which measures the performance of the 2,000 smallest companies in the Russell 3000 index.

Global Small Cap: This product seeks to capitalize upon the continuing globalization of the world economy by investing in small cap companies in the U.S. and throughout the world. The benchmark for this product is the S&P/Citigroup EMI World index.

Global Absolute Return: This product uses the same security selection process of other products offered by EIP, its holdings are generally limited to approximately 30 positions. The benchmark for this product is the MSCI World index.

International Small Cap: This product draws all of its holdings from companies outside the U.S., with 'small cap' defined as companies with market capitalization in the bottom 25% of the publicly traded companies in each country where the strategy is applied. Index comparisons for this product include the S&P/Citigroup Extended Market Index (EMI) and the Europe Pacific Asia Composite (EPAC), commonly referred to as the 'EMI EPAC Index'.

Balanced Portfolios: This product is available primarily to the company's investors. The mix of debt and equity securities is tailored to reflect - the client's tolerance for risk and the client's marginal tax rate or other preferences. The equity components of the portfolios typically reflect EIP's All-Cap equity structure and generally contain 40-60 positions, all of which are held in other EIP products.

Global Equity Shareholder Yield: This product seeks to invest in a portfolio of global equity securities with a history of dividend yields and positive growth in free cash flow. The benchmark for this product is the S&P/Citigroup BMI World index.

Customers

As of June 30, 2007, the company's major customers included - CI Investments, Inc., a Canadian owned investment management company for whom EIP acts as a sub-advisor; Genworth Financial Asset Management, Inc., an investment adviser, through its investments in the Epoch International Small Cap Fund and the Epoch Global Equity Shareholder Yield Fund, and separate account mandates.

History

Epoch Holding Corporation was founded in 2004.

The above Company Fundamental Report is a half-ready report and contents are subject to change.
It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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1 – Data availability depends on company's security policy.
2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
The complete financial data is available for publicly traded companies.

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ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3×3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

- What composes a threat of substitute products and services?
- Is there a threat of new competitors entering the market?
- What is the intensity of competitive rivalry?
- How big is the bargaining power of buyers?
- How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

- Tangible resources
  - Financial
  - Physical
  - Technological
  - Organizational
- Intangible resources
  - Human
  - Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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