



Who Uses It?

Wholesale sales teams use the Wholesale Analytics Report (WAR) to identify the best broker clients and track performance vs. competing wholesalers in real time on a broker by broker basis.

Why Use It?

- Identify which brokers fit your ideal volume profile
- See how much of your broker clients' business you are capturing
- See which competitors your broker clients are using
- See which wholesale competitor's broker clients you can target for new business

Customer Capture

Bucket	Current	Prior	Year Ago
One Unit	93.2%	84.4%	58.2%
2-5 Units	67.7%	53.3%	42.0%
6-10 Units	56.8%	62.3%	47.9%
11-25 Units	51.2%	47.3%	33.3%
26-50 Units	13.9%	61.3%	47.4%
51+ Units	50.5%	78.7%	52.9%
Total	46.3%	61.8%	44.9%

Market Share

Bucket	Current	Prior	Year Ago
One Unit	2.4%	1.6%	1.5%
2-5 Units	4.5%	5.3%	5.0%
6-10 Units	7.8%	10.1%	10.9%
11-25 Units	10.1%	13.3%	12.0%
26-50 Units	5.1%	18.8%	16.8%
51+ Units	27.8%	58.0%	52.9%
Total	8.8%	14.3%	13.7%

A Case Study

John Q. Reverse is SVP, Wholesale Sales for Reverse Lender. He grew his volume 15% last year, but wants to grow 30% this year. He subscribes to RMI's Wholesale Analytics Report (WAR) and finds out that his top 5 brokers are sending 70% of their loans to his competitor. After talking to his clients, he finds out that they're receiving a 25bp better price but his clients still send some business to him because his operations staff is faster. John puts solid numbers behind his request for better pricing to his CEO, winning approval and regaining 90%+ of his top clients' volume.

Broker/Rank	JAMES B NUTTER AND COMPANY	FINANCIAL FREEDOM SENIOR FUNDING CORP	WORLD ALLIANCE FINANCIAL CORP	BANK OF AMERICA NA CHARLOTTE	MET LIFE BANK	GENNORTH FINANCIAL HIM EQUITY ACCESS INC	GENERATION MORTGAGE COMPANY	SUN WEST MORTGAGE CO INC	URBAN FINANCIAL GROUP	WELLS FARGO BANK NA	Others
1ST AAA REVERSE MORTGAGE INC	1	49	3	6	276						
1ST CONTINENTAL MORTGAGE INC	4	102	20	24		11		17			5
1ST FAMILY MORTGAGE INC	466										6
1ST HAND MORTGAGE INC	1193					1					
1ST MORTGAGE SOURCE	1193	1									
1ST PERSONAL MORTGAGE SERVICE	739			3							
1ST SIGNATURE LENDING LLC	1193										1
1ST SOURCE FUNDING INC	51		2		48						
20TH CENTURY HOME LOAN INC	739							3			
928 HERITAGE INC	324	3		7							
A & N MORTGAGE SERVICES INC	911	2									
A BETTER MORTGAGE COMPANY INC	1193										1
A BETTER WAY MORTGAGE & FINANC	324		10								
A D S MORTGAGE CORP	1193		1								
A-1 CAPITAL FUNDING INC	1193										1
AA MORTGAGE GROUP LLC	324	1		8		1					