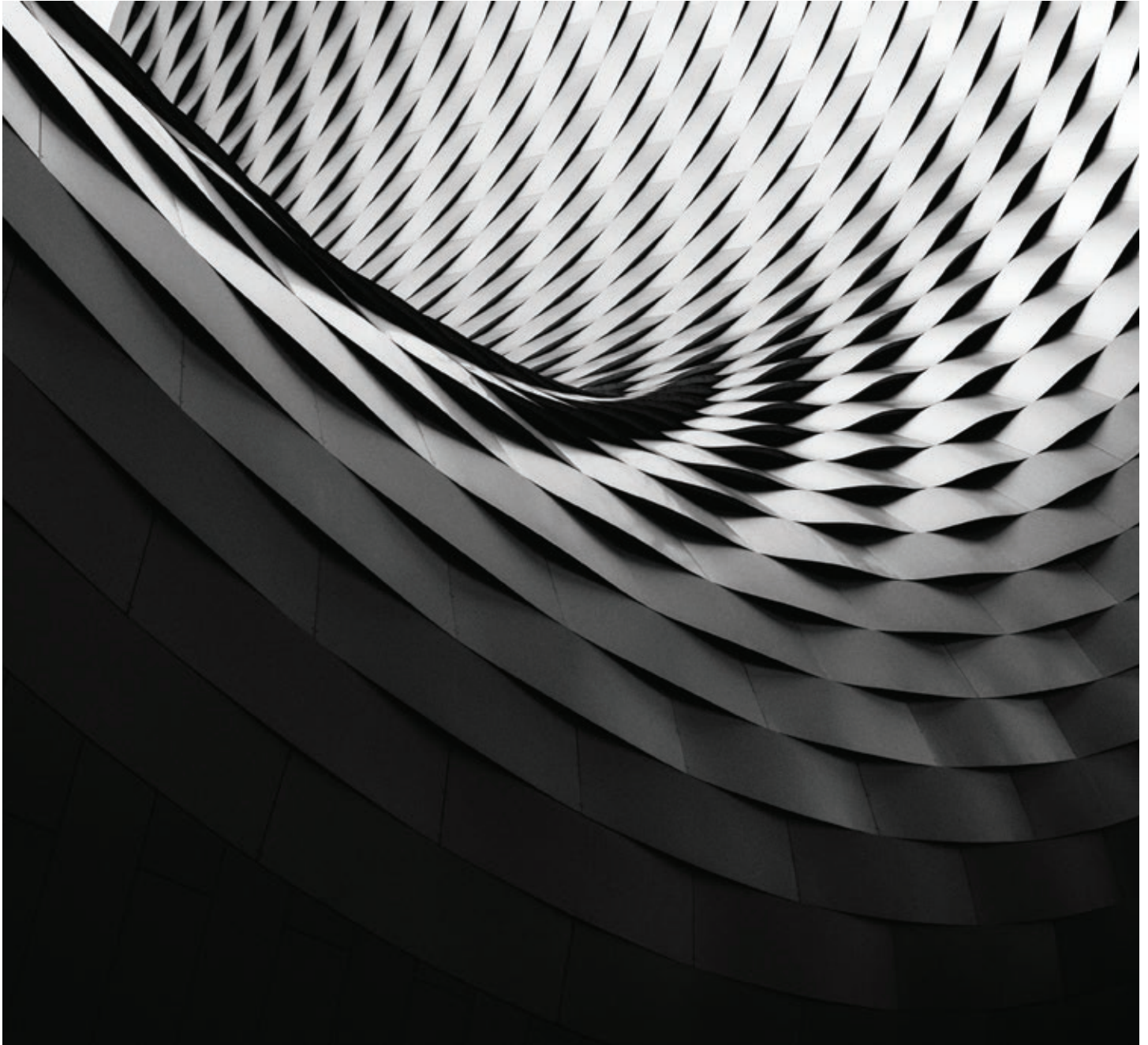


Portfolio Analytics

Communicate Your Alpha

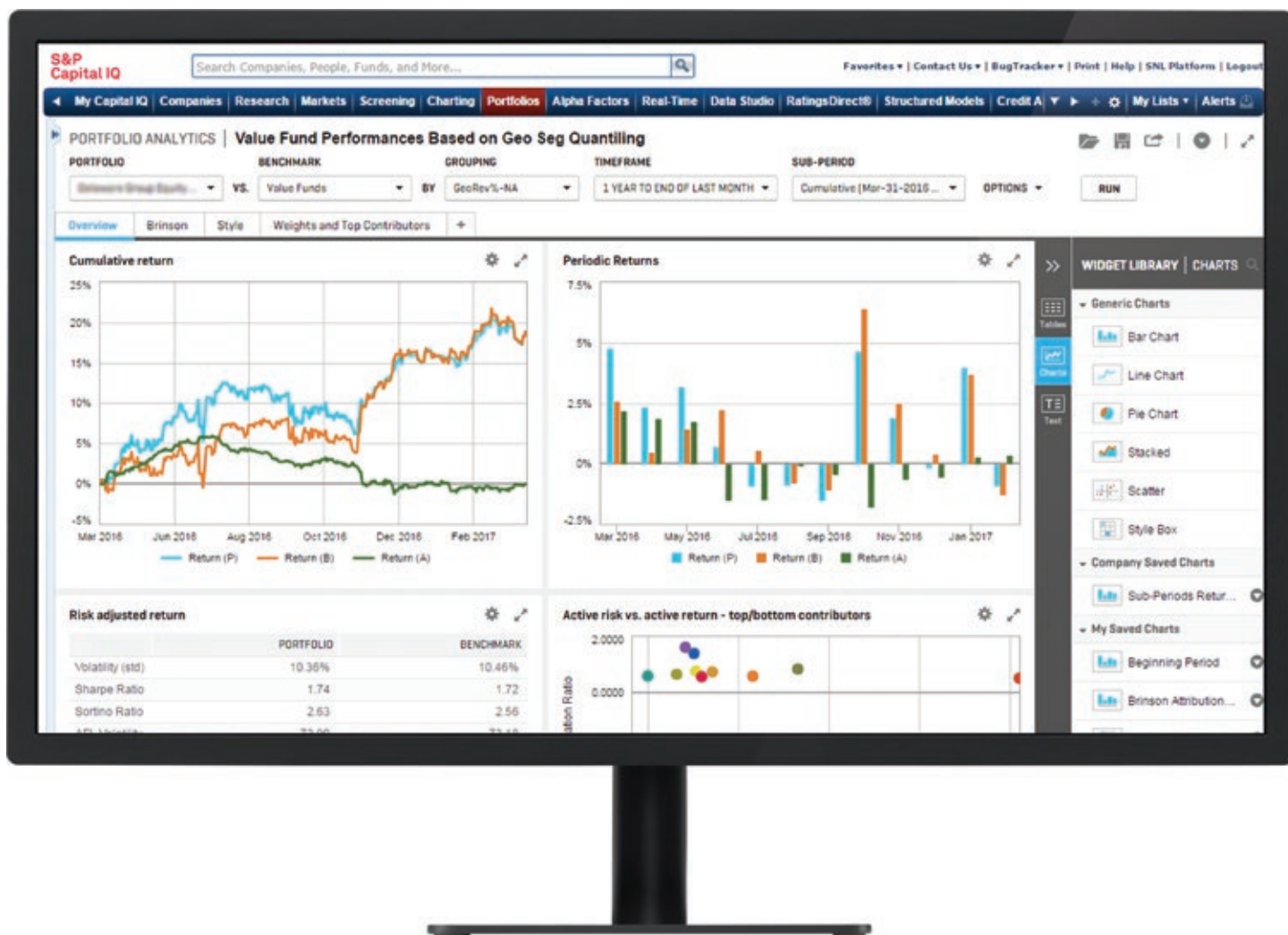


S&P Global

Market Intelligence

Your investment process is what sets you apart. Gain a competitive advantage with streamlined portfolio analysis and flexible reporting.

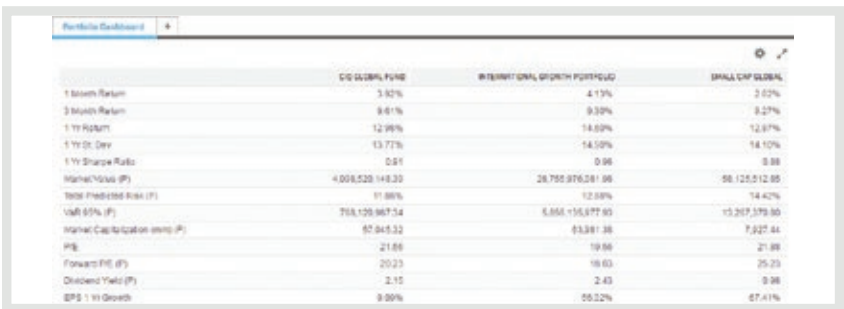
Portfolio Analytics provides greater insight into your investment process by leveraging comprehensive fundamental and industry leading data from S&P Global Market Intelligence into powerful portfolio intelligence. Communicate the strengths behind your strategy and expand your understanding of market factors that impact your investments. Promote your investment process with flexible client-ready reports that highlight your unique strategy.





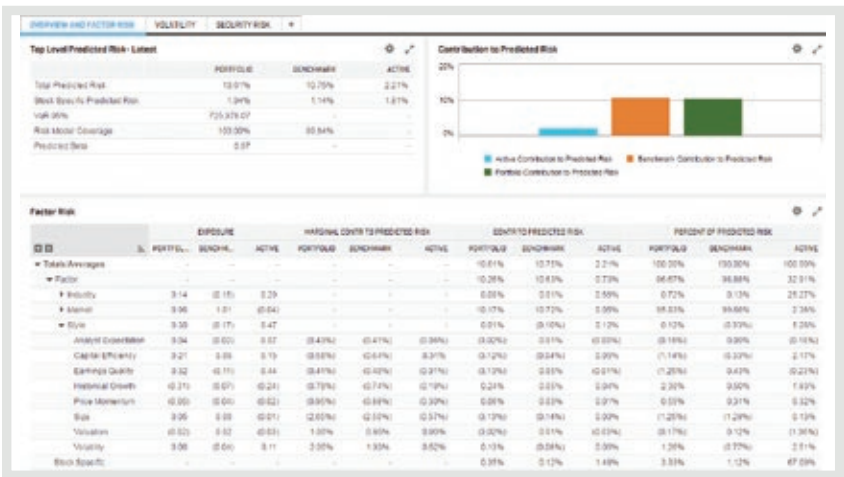
Streamline Portfolio Reporting and Monitoring

- Design custom reports that better showcase absolute and benchmark-relative performance.
- Improve client conversations with deep insights into investment style exposures and sources of risk diversification.
- Run reports on-the-fly or schedule recurring daily, monthly, and quarterly Excel and PDF reports to be delivered via email or ftp with your corporate branding.



Customize Dashboards for a Quick Snapshot of Your Portfolios

- Quickly assess and compare your performance relative to peer funds, exchange traded funds, and indices.
- Leverage an extensive library of client-ready layouts or configure custom dashboards by dragging and dropping tables, charts, graphics, and text.



Incorporate Your Competitive Advantage into Analytics

- Integrate proprietary classifications, rankings and metrics that highlight your investment strategy and performance.
- Study and uncover investing signals with Alpha Factor Library, totaling over 550 valuation, sentiment, earnings quality and capital efficiency factors.
- Identify hidden risk exposures to currencies, regions, industries and styles.

About S&P Global Market Intelligence

S&P Global Market Intelligence integrates financial and industry data, research, and news into tools that help track performance, generate alpha, identify investment ideas, understand competitive and industry dynamics, perform valuation, and assess risk.

CONTACT US

The Americas

+1-877-863-1306

Europe, Middle East & Africa

+44-20-7176-1234

Asia-Pacific

+852-2533-3565

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