

# Barra Portfolio Manager Technology

Helping build better portfolios

The Barra logo features the word "Barra" in a bold, sans-serif font. The letter "B" is stylized with a green swoosh that extends to the right and then curves back down to underline the "a".

An MSCI Brand

Barra Portfolio Manager delivers the next generation of equity portfolio management tools, and is designed to help fund managers and their teams build better portfolios, regardless of investment process. Barra Portfolio Manager has completed a SSAE16 Type II audit and is built on the same proven technology platform as BarraOne, which has served the risk reporting needs of clients since 2002.

Barra Portfolio Manager offers a secure, hosted platform that is easy to use, and reduces the technology overhead of deployed solutions. It accesses the latest Barra models, market data and equity portfolio analytics.

## Installation and Technical Requirements

Barra Portfolio Manager provides a rich user experience through a lightweight Java application that communicates securely with the Barra platform. The application installs directly from the Barra platform and upgrades are performed automatically. With all data and processing managed on the hosted platform, Barra Portfolio Manager requires minimal desktop computing resources.

### System Requirements

- High-speed internet connection allowing 128-bit encryption over SSL
- Java Runtime Environment installed (v. 1.6\_0\_20 or higher recommended)
- 1+ GB RAM recommended
- Desktop running Windows XP or higher
- Recommended screen resolution of 1280x1024

### Network Requirements

- Java Runtime configured for internet connectivity using standard proxy settings
- Secure HTTP communication over port 443; no special firewall configuration required
- No cookies, Active-X controls, or plug-ins required

### Installation

- One-click installation of signed Java application
- Automatic upgrades ensure the latest features of Barra Portfolio Manager are available
- Accessible from any internet-enabled computer

# Platform Security and Stability

MSCI is committed to the security of client data and ensuring that Barra Portfolio Manager is ready when you need it most. MSCI has successfully completed a SSAE16 Type II audit for Barra Portfolio Manager, reporting on the controls in place on the platform and their operational effectiveness.

## Data Security

- MSCI does not record, process, summarize or report the financial transactions of user organizations
- All data transfers to and from the platform use 128-bit encryption over SSL
- Physical and electronic access to client data is stringently controlled
- Annual platform penetration tests are performed by a third-party security firm

## Platform Stability

- Automated monitoring and alerting of all platform components
- Numerous physical and environmental controls to protect our collocation facilities
- Duplication of critical services to eliminate single points of failure
- A physically separate backup facility for business continuity

## Internal Security

- Barra Portfolio Manager provides various controls to help you manage your internal security and privacy concerns:
  - Local administrator privileges for managing accounts
  - Portfolio and user data visibility restricted through workgroup membership
  - Local password complexity and reset rules

## Next Steps

MSCI understands that many clients have a software review process for new products and, if you are interested in licensing Barra Portfolio Manager, recommends discussing this with your IT or security department. Please contact us with any technology questions or to arrange a discussion on Barra Portfolio Manager.

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**MSCI** About MSCI

MSCI Inc. is a leading provider of investment decision support tools to investors globally, including asset managers, banks, hedge funds and pension funds. MSCI products and services include indices, portfolio risk and performance analytics, and governance tools.

The company's flagship product offerings are: the MSCI indices with approximately USD 7 trillion estimated to be benchmarked to them on a worldwide basis; Barra multi-asset class factor models, portfolio risk and performance analytics; RiskMetrics multi-asset class market and credit risk analytics; ISS governance research and outsourced proxy voting and reporting services; FEA valuation models and risk management software for the energy and commodities markets; and CFRA forensic accounting risk research, legal/regulatory risk assessment, and due-diligence. MSCI is headquartered in New York, with research and commercial offices around the world.

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<sup>1</sup> As of June 30, 2011, based on eVestment, Lipper and Bloomberg data.