

› Barra Portfolio Manager Technology

Helping build better portfolios

Barra Portfolio Manager delivers next-generation equity portfolio management tools and is designed to help build better portfolios, regardless of the investment process. This secure and fully hosted online application completed an SSAE16 Type II audit and is built on the same technology platform as BarraOne, which has served the risk reporting needs of clients since 2002.

Barra
An MSCI Brand

Interactive and easy-to-use, Barra Portfolio Manager reduces the technology overhead of deployed solutions and also provides access to the latest Barra models, market data, and equity portfolio analytics.

Installation and Technical Requirements

Barra Portfolio Manager offers 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

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Platform Security and Stability

MSCI is committed to the security of client data and ensuring Barra Portfolio Manager is ready when you need it most. The company has successfully completed an 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 to arrange a discussion on Barra Portfolio Manager or for any technology concerns.

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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 close to USD 7 trillion estimated to be benchmarked to them on a worldwide basis¹; Barra multi-asset class factor models, portfolio risk and performance analytics; RiskMetrics multi-asset class market and credit risk analytics; IPD real estate information, indices and analytics; MSCI ESG (environmental, social and governance) Research screening, analysis and ratings; 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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¹ As of September 30, 2012, as published by eVestment, Lipper and Bloomberg on January 31, 2013.