

MSCI transforms risk analytics for the future with new GenAI-powered tool and modelling technology

MSCI AI Portfolio Insights and Macro Finance Analyzer will help investors identify, manage, and analyze data-driven portfolio risks

NEW YORK – June 10, 2024 – MSCI Inc. (NYSE: MSCI), a leading provider of mission-critical decision support tools and services for the global investment community, today launched **MSCI AI Portfolio Insights**. Combining generative artificial intelligence (“GenAI”) with MSCI’s award-winning analytics tools and advanced modelling technologies, MSCI AI Portfolio Insights is designed to help investors better identify and manage potential emerging risks that dynamic markets pose to their portfolios.

MSCI has combined its extensive risk and performance modelling capabilities with GenAI to enhance risk reporting. MSCI AI Portfolio Insights aims to create efficiencies and deliver insights to institutional risk and portfolio managers by helping identify and analyze the most salient information in risk reports before the working day starts.

Investors can use MSCI AI Portfolio Insights’ interactive capabilities to drill further into changes in their portfolios without any need for code or extensive user interface dropdowns. MSCI AI Portfolio Insights merges generated text with modern dashboards and cloud-based technology to enhance communication and efficiency in risk and portfolio management. These tools aim to empower risk management teams at asset managers, hedge funds and asset owners to drive collaboration across their firm’s investment teams.

Traditionally, risk managers have invested significant time and resources integrating complex models to process, clean, generate, store, and extract all data necessary to provide a comprehensive overview of risk and performance. Today, risk leaders at investment firms face increased pressure to deliver both enterprise-wide risk monitoring on a growing number of portfolios and risk advisory services to their investment teams. At the same time, global challenges like climate change, geopolitical tensions, macroeconomic uncertainty, and technological advancements have created new investment challenges and opportunities for risk leaders to monitor.

MSCI AI Portfolio Insights leverages proprietary algorithms to curate large volumes of data, aiming to surface the most important factors impacting risk and performance and connecting them as appropriate to market events. It also features an AI agent to help risk managers further understand and decompose the risk and performance drivers. Based on natural language interaction, the assistant can answer complex questions about portfolios.

“Institutional investors both can and must shift their risk teams from being largely control-oriented to also being an investment-focused function,” said **Ashley Lester, Chief Research Officer at MSCI**. “With MSCI AI Portfolio Insights, we are transforming risk reporting to make it more insightful and more accessible to investment decision makers. Risk should not be just about monitoring: it should be about providing investors with actionable insights.”

MSCI also introduced the **Macro Finance Analyzer** today, leveraging MSCI’s financial modeling and stress-testing capabilities. This tool is designed to test how changes to macroeconomic conditions

could affect a portfolio's risks and returns across asset classes, supporting investors' asset allocation decisions. Users can explore and test a wide variety of conditions, with the ability to adjust expectations for rapidly evolving market events and trends – like potential impacts of interest rate changes or changes in long-term economic growth.

“At MSCI, we have observed a shift in the relationship between investment and risk management teams, driven by senior investment leaders' growing demand for the integration of risk analytics into the investment process,” said **Jorge Mina, Head of Analytics at MSCI**. “Risk teams must seek efficiencies, modernize processes, and enhance the guidance they offer to the entire investment organization. To accomplish these goals and increase collaboration with portfolio managers, risk managers need the right toolkit, which is now provided on a single platform by MSCI.”

MSCI's portfolio analytics tools are available on [MSCI ONE](#), a cloud-based technology platform that combines flexible distribution, cloud delivery, dashboards, and visualizations. [Launched in 2022](#), the platform enables users to seamlessly navigate MSCI's robust analytics to help them identify key insights, innovate rapidly, and build investment portfolios that seek to deliver better strategic outcomes.

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About MSCI Inc.

MSCI is a leading provider of critical decision support tools and services for the global investment community. With over 50 years of expertise in research, data, and technology, we power better investment decisions by enabling clients to understand and analyze key drivers of risk and return and confidently build more effective portfolios. We create industry-leading research-enhanced solutions that clients use to gain insight into and improve transparency across the investment process. To learn more, please visit www.msci.com.

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