

MSCI launches portfolio customization solution to enable portfolio managers to personalize SMAs for clients

Quantitative Investment Solutions enable investment advisers to meet growing investor demand for cost-effective tax management, tailored strategies

NEW YORK – June 21, 2023 – MSCI Inc. (NYSE: MSCI), a leading provider of critical decision support tools and services for the global investment community, today announced the launch of [Quantitative Investment Solutions \(QIS\)](#) – a new set of tools to help portfolio managers customize separately managed account (SMA) portfolios efficiently and at scale.

Using MSCI QIS, managers can tailor portfolios to their clients' specific values and investment goals quickly and efficiently. In addition to tax requirements, managers that offer SMAs can implement customization requests spanning single company exclusions, industry exclusions, ESG and style preferences.

The QIS toolkit includes a portfolio construction service for separate account management that enables equity portfolio managers at asset managers and other investment advisers to manage tax implications for their clients across different scenarios, – such as close model tracking, tax neutral, or tax loss maximization, – in addition to providing daily updates that show proposed trades for different accounts based on the clients' investment objectives.

MSCI QIS gives portfolio managers access to unique tax strategy templates, enabling them to select and apply a variety of constraints and objectives that match their client's current tax and exposure considerations.

Through cloud-based technology, QIS links the MSCI tax optimization tool to MSCI's indexes, ESG ratings, carbon emissions and factor models to allow portfolio managers to implement unique portfolio requests from clients in an efficient manner.

Asset managers are challenged to meet the growing demand for SMAs across their client base. The implementation of custom requirements for SMAs is highly labor intensive and requires integrations of various technological systems and teams in such ways that create operational risks.

Mark Carver, Head of Equity Portfolio Management and Equity Factors at MSCI, said: "In an age where customization is in demand in every facet of business, portfolio managers are constantly being faced with the challenge of balancing multiple investment objectives to address an individual client's needs. Whether it's reflecting their personal preferences with respect to investment strategies in their portfolios, or managing their ongoing tax liabilities, MSCI QIS is designed to not only allow portfolio managers to gauge their clients' needs, but also compete more effectively for assets by meeting a wider range of custom requirements in a shorter period."

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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.

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