BARRA® PORTFOLIOMANAGER

BARRA® PORTFOLIOMANAGER IS A CLOUD-BASED, INTERACTIVE PLATFORM FOR THE PROFESSIONAL EQUITY INVESTOR COMMUNITY.

NEW IN THIS RELEASE :

- **Barra Peer Analytics**
- **Risk Delta Analytics**
- **Enhancements to Performance Attribution**
- **Barra Optimizer 8.1 Integration**

KEY BENEFITS

- **Attribution –** Choose from traditional (Brinson), factor-based, or hybrid approaches to understand and decompose the sources of portfolio risk and return from either your own portfolio or a peer mutual fund.

- **Custom Factor Attribution –** Leverage MSCI's patented solution for decomposing risk and returns. Use your own industry classifications or incorporate other custom data to make risk attribution customized to your unique investment process.

- **Scenario and What-if Analysis –** Simultaneously evaluate point-in-time and time-series risk, return and style exposures using multiple risk models, dates and portfolios.

- **Portfolio Construction –** Use *Barra* Optimizer to build portfolios that achieve an optimal combination of predicted risk and return, subject to constraints and investment objectives. Efficiently rebalance or construct a large number of portfolios in a single rebalance cycle.

- **Strategy Research and Development –** Create and simulate investment strategies using market and third-party attributes and data. Dynamically change constraints or objectives to adapt to different market conditions or business cycles.

- **Custom Data –** Use Formula Builder to create and refine alphas, generate custom data and attributes for risk reports and portfolio optimization, or incorporate portfolio-level statistics.

- **Reporting –** Manage a complete end-to-end workflow that includes setup, monitoring, exception handling and hands-free extraction of single or multiple reports with an easy-to-use interface. Automate the reporting process with either CSV or customized PDFs to compare your holdings using MSCI supplied and third party attributes like industry and sector classifications, Economic Exposure and Fundamental data.
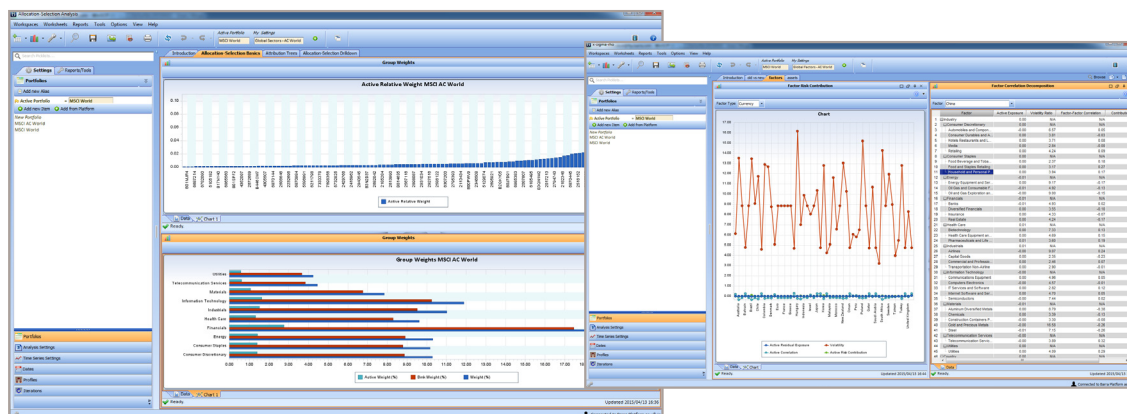
Barra PortfolioManager provides a flexible and customizable user interface that allows for sharing strategies, analytics, and reports

MSCI

Barra PortfolioManager is designed for research, reporting, strategy development, portfolio construction and performance and risk attribution

- **Alternative Investments –** Full coverage of oil, gold, FX forwards, equity options and short-term fixed income cash equivalents.

- **Barra Peer Analytics –** Enable investment managers to better understand their competitive landscape and identify the main drivers of risk and performance for equity mutual funds. Asset Owners and Fund-of-Fund managers can significantly improve their manager evaluation and selection process.

TECHNOLOGY HIGHLIGHTS

Barra PortfolioManager is a secure hosted platform independently verified to protect client data, through SSAE-16 and ISAE-3402 audits. It is built on the same technology platform as *Barra*One.

24x5 Support

Our highly trained Client Service team is ready to provide product and analytics expertise before, during and after your trading hours.

Installation

- Accessible from any Internet-enabled computer

- Automatic upgrades ensure the latest features of *Barra* PortfolioManager are always available

System Requirements

- High-speed Internet connection allowing 128-bit encryption over SSL

- Java Runtime Environment installed (v. 1.6_0_20 or higher recommended)

- Windows XP or higher Network Requirements

- Java Runtime configured for Internet connectivity

- Secure HTTP communication over port 443

ABOUT MSCI

For more than 40 years, MSCI's research-based indexes and analytics have helped the world's leading investors build and manage better portfolios. Clients rely on our offerings for deeper insights into the drivers of performance and risk in their portfolios, broad asset class coverage and innovative research. Our line of products and services includes indexes, analytical models, data, real estate benchmarks and ESG research. MSCI serves 98 of the top 100 largest money managers, according to the most recent P&I ranking. For more information, visit us at www.msci.com.