

INVESTORFORCE® REPORT

Historically, period end performance reporting to institutional investment clients has been a time-consuming and laborious process. Gathering, consolidating, and aggregating data from many sources, developing reports, and assembling them into a professional looking package has made performance reporting very stressful.

With *InvestorForce* Report, the most advanced and comprehensive performance measurement reporting platform offered to the institutional investment community, you will impress your clients with dynamic, professional looking reports, while creating them with ease and confidence.

We have taken a holistic approach by fully integrating all the key stakeholders in the institutional investment channel. *InvestorForce* Report is a hosted software as a service (SaaS) product.

Automated data collection and aggregation from custodial banks, money managers and industry sources, real-time access to plan data, powerful analytics at the account and composite level, and the ability to quickly create “publish ready” performance reports at the click of a button, enables *InvestorForce* to stand apart.

You will quickly see the enormous savings in the time and effort required to report to your plan sponsors.

InvestorForce Report’s advanced report designer tool allows you to create report templates that define the custom elements of your performance reporting package— individually—for each client.

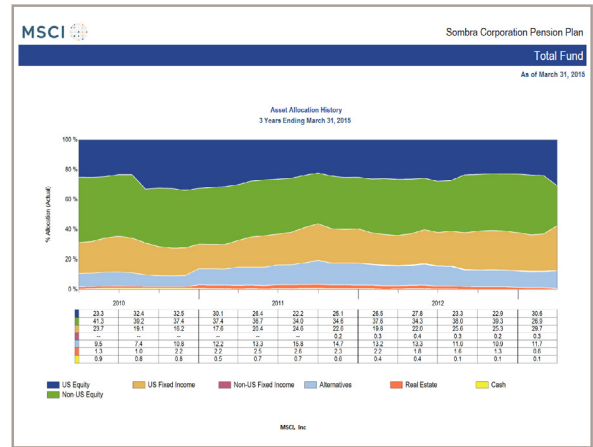
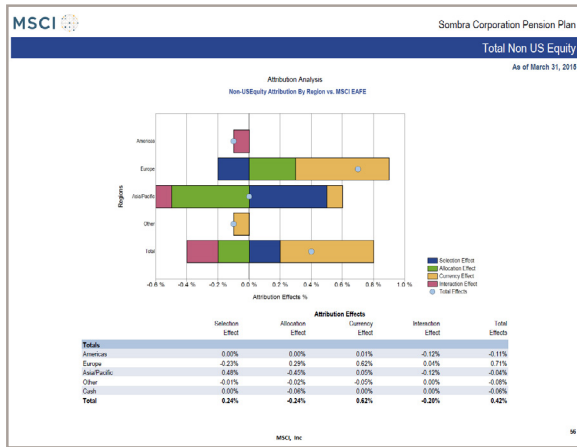
You simply drag and drop report objects onto the various pages of your report template. A database of over 130 analytics are at your disposal to be dropped onto a report page. Extensive formatting options for all charts and graphs allow you to create a stunning performance package. Easily tailor the look and feel— brand your performance reports with your company and clients’ logos.

INVESTORFORCE® IS YOUR SOURCE FOR PERFORMANCE REPORTING PRODUCTS AND SERVICES

With endless exhibit options that follow your brand guidelines, *InvestorForce* Report allows you to create an impressive performance package.

DYNAMIC ANALYTICS AUTOMATICALLY PULL THE MOST CURRENT DATA WHEN YOU ARE DESIGNING REPORTS— THIS MEANS YOU WILL KNOW WHAT YOUR REPORT EXHIBITS WILL LOOK LIKE BEFORE YOU RUN IT!





INVESTORFORCE® AT A GLANCE

- Real time access to your clients data
- Automated account and group/composite performance calculations
- Full integration of market reference data, such as, benchmarks returns, characteristics, manager and plan universe data and Morningstar mutual fund data
- Complete integration with a robust security master to support holdings-based analytics
- Create custom performance report templates that can be saved and run each reporting period
- Drastically reduce the time, effort and cost of performance reporting
- Produce professional PDF reports for easy distribution
- Over 130 analytics from which to choose to create extensive customization for exhibits
- Easily add text, annotations, and firmwide or plan level commentary
- Global, 24/7 access, allowing users to work from home, office or on the road

Let us show you how *InvestorForce* Report can help you reach your performance reporting goals.

Call us today at 484-351-7200 or email at InvestorForceSales@msci.com

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