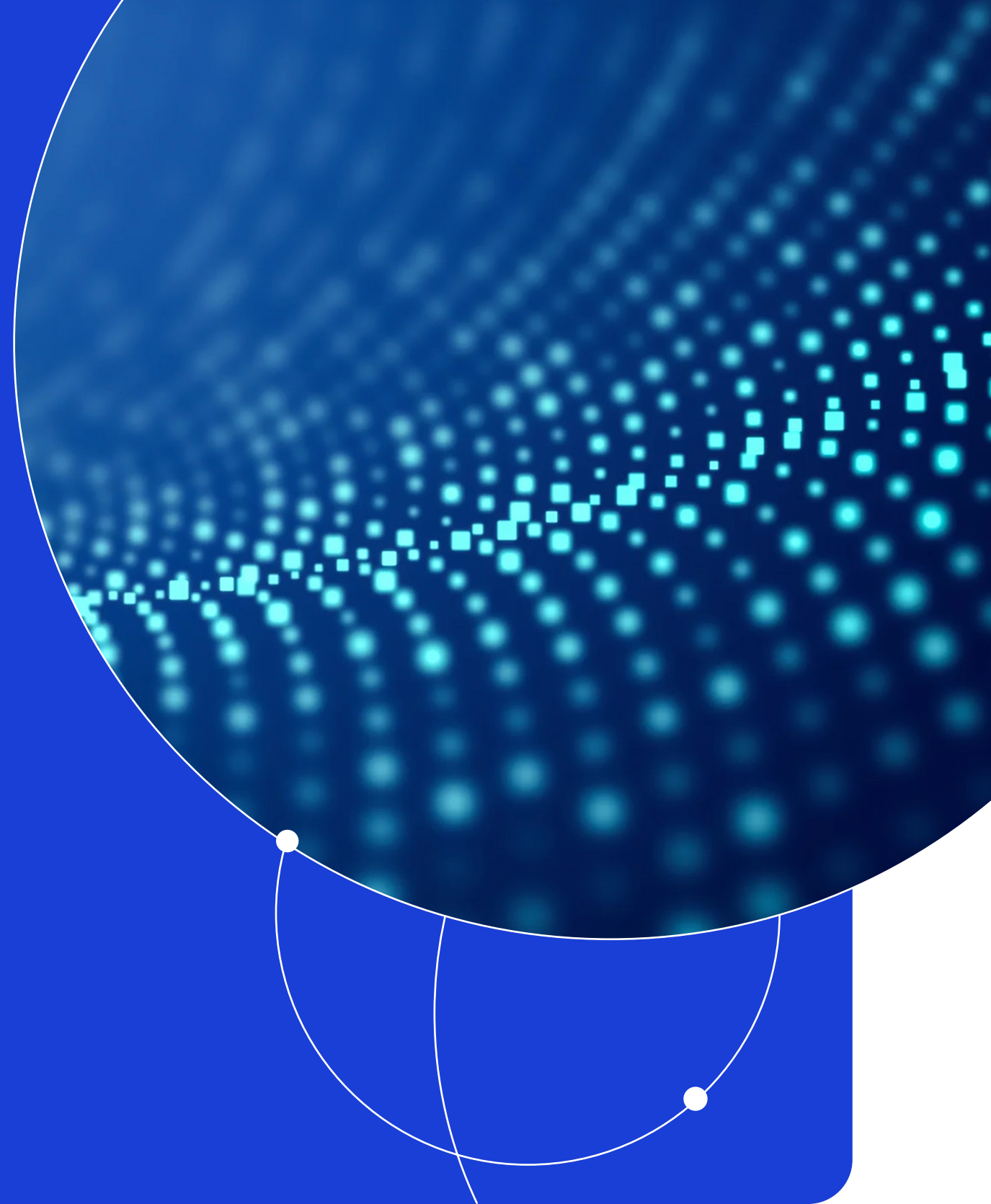




MSCI Analytics

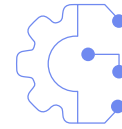
# Helping you find your edge

MSCI Analytics Enhancements Summary



# Insights that create an actionable view of risk and return

Helping you evaluate strategies  
and make informed decisions.



## MSCI AI Portfolio Insights

Uses generative AI to surface and explain key portfolio risk & performance drivers, reducing time spent on analysis.



## Sustainability and Climate Integration

Equips tools to comply with growing regulations and wider coverage across public and private asset portfolios.



## Model and Data enhancements

Provides enhanced modeling for Money Markets and Futures. Enhances data accuracy and reduces processing time.



## Rich, intuitive dashboards

Enables access to underlying data and visualizes them through interactive dashboards and ready-to-use reports.

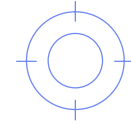


## Enhanced Historical Results Storage

Expanded access to historical analytics, supporting trend analysis and reporting.

**Innovation** that enables  
you to build resilient  
and differentiated portfolios

**Investing in advanced solutions to help  
you identify opportunities.**



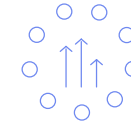
#### MSCI Macro Finance Analyzer

Evaluates the effect of different macro scenarios on long-term risk and expected return on portfolios.



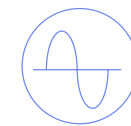
#### MSCI Optimizer

Supports tax-aware and multi-account optimization, improving portfolio customization.



#### New Equity Factor Models

Enables precise factor exposures, peer-specific risk methodologies, improved predictive power, and deeper insights into portfolio risk and performance drivers.



#### Next-Gen Issuer Curves

Doubles issuer coverage and improved curve shapes, leading to more accurate risk forecasts.

# Flexibility that enhances scale and unlocks efficiencies

Aiding you to accelerate performance, eliminate gaps, and drive modernization.



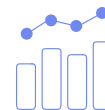
## Open Architecture

Enables clients to pull MSCI data into their native systems increasing efficiency.



## Infrastructure Upgrade

Reduces batch run time to enable faster end-to-end processing of risk results.



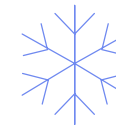
## Excel Add-in Enhancements

Offers new statistics, expanded reference data and better usability for risk workflows.



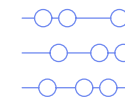
## Architecture Modernization

Envisions a personalized, collaborative and iterative approach to modernizing clients risk infrastructure.



## Snowflake Integration

Provides faster, cloud-based access to analytics with improved performance for large-scale data sets.



## Multi-Threaded Portfolio Imports

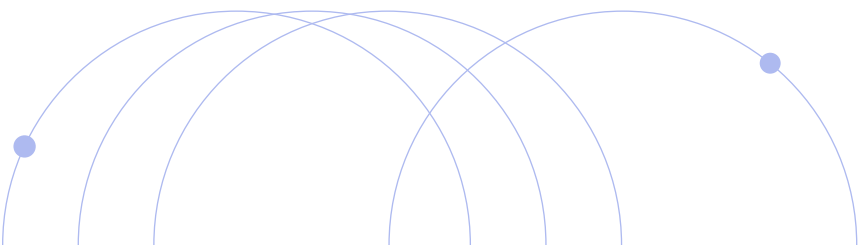
Reduces load times for large portfolio calculations.

## Key Updates

### Enterprise Risk and Performance

**Enhanced risk transparency with expanded multi-asset coverage and integrated climate risk analytics built to deliver a clearer view of public and private asset portfolio risk and more precise risk attribution.**

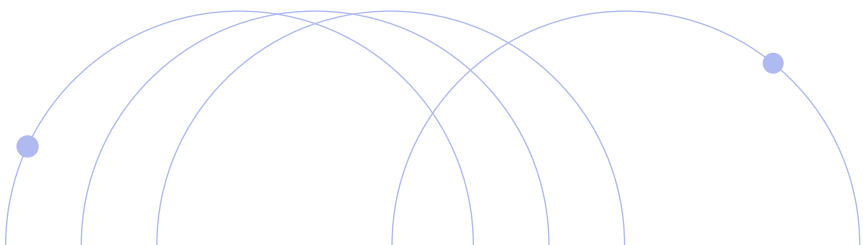
- AI Portfolio Insights helps risk professionals quickly identify risk and performance drivers in their portfolio.
- Cloud-based Results Warehousing tool delivers analytics that can be integrated into clients reporting framework.
- Expanded multi-asset factor models improves asset class integration.
- Refined scenario analysis enhances stress testing under macroeconomic conditions.
- Integrated climate risk analytics provides deeper sustainability and regulatory insights.
- Improved time-series analytics helps with modeling interest rates, credit spreads, and inflation.



## Key Updates Equity Analytics

**Expanding factor models, improving benchmark alignment and enabling personalization at scale.**

- Next-generation factor models provides improved risk and performance attribution.
- Seamless access to MSCI's equity analytics data within clients' Snowflake environments.
- Reduced data latency for quicker access to market-relevant analytics.
- Stronger predictive signals for equity models using alternative data sources.
- Quantitative Investment Solutions offering Portfolio Managers with personalization for tax advantaged strategies.

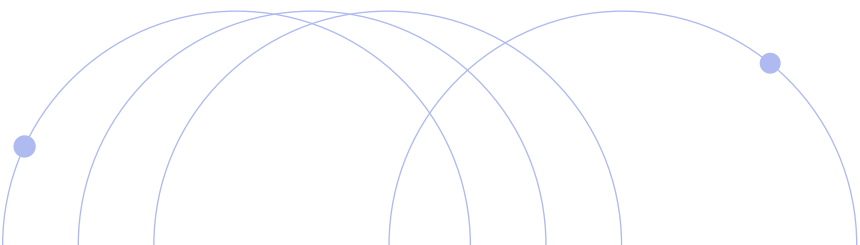


## Key Updates

### Fixed Income Analytics

**Richer coverage of credit and yield factors, deeper securitized analytics and more robust risk modeling.**

- Single security analyzer (SSA) extended for multiple security analysis.
- Excel add-in for securitized products enabling security-level analysis via SSA.
- Improved model quality for corporate bonds with increased granularity of investment grade / high yield factors.
- JPM Benchmark Hedging Methodology for better returns calculation.
- Innovative pricing model for callable municipal bonds.
- Continued focus on accuracy through upgraded pricing models.
- Ability to select new benchmarks and preserve previously computed results through benchmark retention.
- Model enhancements for distressed and defaulted bonds.



# Scaling for the Future

## Intelligent, Adaptive Solutions

**Continued investment in systemic enhancements to deliver smarter, faster and more adaptable solutions.**

### Key 2025 enhancements:

- Advanced research, models and data.
- Integration and automation to address whitespaces and improve efficiency.
- AI to scale data production, automate key processes and build market-fit solutions.
- Improved data architecture, processing power and integration frameworks for more responsive analytics across all MSCI solutions.
- Improved computational power, cloud architecture and data distribution through expanded Snowflake integration, multi-threaded processing upgrades and more intelligent risk and attribution frameworks.

# Featured Research Powering Strategy and Innovation

**MSCI's research informs product development and helps investors with the data and insights to better understand emerging risks and opportunities.**

## Investment Trends in Focus: Five Key Themes for 2024

Launched in 2024, offering insights into key market forces shaping investment risks and opportunities.

[Link](#)

## AI Portfolio Insights and the Future of Risk Management

Explored role generative AI plays in building risk managers' ability to influence investment decisions and portfolio resilience by delivering rapid, narrative-driven insights.

[Link](#)

## Macro Scenarios in Focus: Hard-Landing Risks Keep Investors on Edge

Offered investors framework to evaluate impact on multi-asset class portfolios based on various scenarios.

[Link](#)

## Private Capital in Focus: Q2 Returns and an Exploration of Holding Periods

Provided insights into private market risk and return to support growing need for total portfolio approach spanning public and private markets.

[Link](#)

# Systems, Solutions and Support

## Building a Strong Foundation

**Providing the fastest time-to-value  
through continued investment in technology,  
infrastructure and client services.**



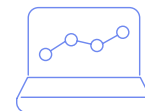
### AI in action

Solutions to scale data, transform the client experience and provide operational efficiencies.



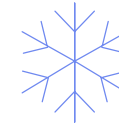
### API coverage & performance

Optimized for real-time data retrieval and seamless integration into client environments.



### Intelligent data storage

Expanded historical storage for analytics, allowing for deeper trend analysis over time.



### Snowflake integration

Faster, more scalable cloud-based data access, reducing latency and improving flexibility.



### Cloud native & processing pipelines

Infrastructure improvements to smooth ingestion and broaden accessibility of analytics.



### Client servicing and implementation support

Client services investments supported by AskMSCI, our AI-powered conversational tool and implementation support.

# By the Numbers

## Measurable Advancements

**Delivering real, quantifiable improvements  
- reducing run times, increasing efficiency  
and expanding capabilities to help you better  
analyze risk and optimize portfolios.**

### <2 hours

Overnight batch run times for performance attribution reports.

### T-1

Reporting for Data Load and Delivery of Index Data (from T-2).

### 70%\*

Speed gains in risk reporting jobs.

### 1st

Real Time Factor Returns released for USA models, designed to deliver intraday updates of factor returns.

### Up to 70%

Improvement in results population of performance attribution reports.

### 60% to 90%

Framework enhancement to dynamically allocate compute resources.

### 99.9%

Data accuracy rate with 1.1mn+ input data errors cleansed at the source to enable high-quality data.

### 3 to 6 hours

Time reduction in processing and publishing FTSE, Markit, JPM EMBI and other benchmark data in MSCI platforms.

# Industry Awards

## Recognized for Excellence

**Our investments and innovations  
have been recognized across  
the industry.**

Winner

## 2024 Chartis BuySide Platforms Category<sup>1</sup>

Managed Services (Analytics, Risk,  
Middle Office) Solution category

Leader

## 2024 Verdantix Recognized as a Leader among Green Quadrant<sup>3</sup>

Climate Financial Data and Analytics Providers

Winner

## 2023 Waters Rankings<sup>5</sup>

“Best Performance Measurement and Attribution  
systems provider”

“Best Buy-Side Performance Measurement and  
Attribution Product” for second consecutive year.

Winner

## 2024 Chartis RiskTech 100 Category<sup>2</sup>

Risk as a Service (RaaS) category  
ESG category

Winner

## 2024 Asia Risk Awards<sup>4</sup>

“Best Portfolio Optimization Solution”  
for MSCI’s Barra Open Optimizer

Detailed information about the respective awards and their methodologies can be found:

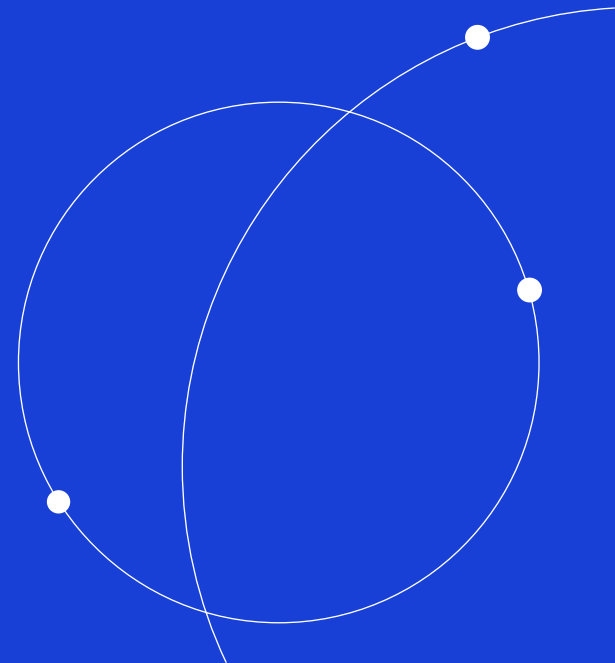
<sup>1</sup><https://www.chartis-research.com/hedge-funds/7947279/buyside-platforms-2024>

<sup>2</sup><https://www.chartis-research.com/data/7947012/risktech100r-2024-results>

<sup>3</sup><https://www.verdantix.com/report/green-quadrant-climate-financial-data-and-analytics-providers>

<sup>4</sup><https://www.risk.net/awards/7960010/asia-risk-technology-awards-2024>

<sup>5</sup><https://www.watertechnology.com/awards-rankings/7951211/waters-rankings-2023-best-performance-measurement-and-attribution-system-provider-msci>





# About MSCI

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](https://www.msci.com)

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