



## MSCI forges strategic collaboration with PNC Bank to expand personalized wealth management

**New York – Aug. 13, 2025** – MSCI Inc. (NYSE: MSCI) and PNC Bank have entered into a strategic collaboration to provide financial advisors of PNC with access to [MSCI Wealth Manager](#) – a fully integrated digital platform with robust analytics, portfolio management tools, institutional-grade research and solutions to help advisors create more personalized experiences for end-investors.

From high-net-worth and emerging-affluent individuals to large, sophisticated institutional investors, asset and wealth managers are increasingly asked to create customized portfolios that reflect their end-clients' unique financial goals, risk tolerance and values. MSCI Wealth Manager was designed to support advisors' efforts to provide tailored financial advice to a wider range of clients by unifying portfolio construction, model management, analytics and client proposal generation within a single solution.

MSCI Wealth Manager connects advisors and investment teams through a unified ecosystem built on MSCI's multi-asset class (MAC) risk model. The solution is designed to quickly illustrate risks in a client portfolio by identifying assets that are outliers based on the clients' risk appetite. Furthermore, advisors can compare, align and personalize their clients' portfolio around recommended asset allocations on the MSCI Wealth Manager platform.

With MSCI Wealth Manager, advisors can:

- Differentiate their clients' experiences by providing a base of transparent, multi-asset analytics, risk decomposition tools, and outcome-based investment insights that can be retrofit to an individual investor's goals;
- Tap into new opportunities by leveraging MSCI's deep expertise in index construction, sustainability, and private asset coverage, as well as factor modeling; and
- Analyze portfolio data from current and prospective clients' investment statements, which can be uploaded directly to the platform.

"MSCI Wealth is proud to support PNC as it continues to drive greater personalized wealth experiences," said **Alex Kokolis, Global Head of Wealth at MSCI**. "This collaboration reflects a growing trend across the industry: Advisors are seeking better ways to navigate market complexity and meet evolving client needs. With MSCI Wealth Manager, firms like PNC can equip their advisors with the insights, data, and technology that can be used to scale advice delivery and support their clients with greater clarity and confidence."

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## About MSCI

MSCI Inc. (NYSE: MSCI) strengthens global markets by connecting participants across the financial ecosystem with a common language. Our research-based data, analytics and indexes, supported by advanced technology, set standards for global investors and help our clients understand risks and opportunities so they can make better decisions and unlock innovation. We serve asset managers and owners, private-market sponsors and investors, hedge funds, wealth managers, banks, insurers and corporates. To learn more, please visit [www.msci.com](http://www.msci.com).

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