



# MSCI Total Plan Manager's Report Builder

Your solution for effortless customized reporting

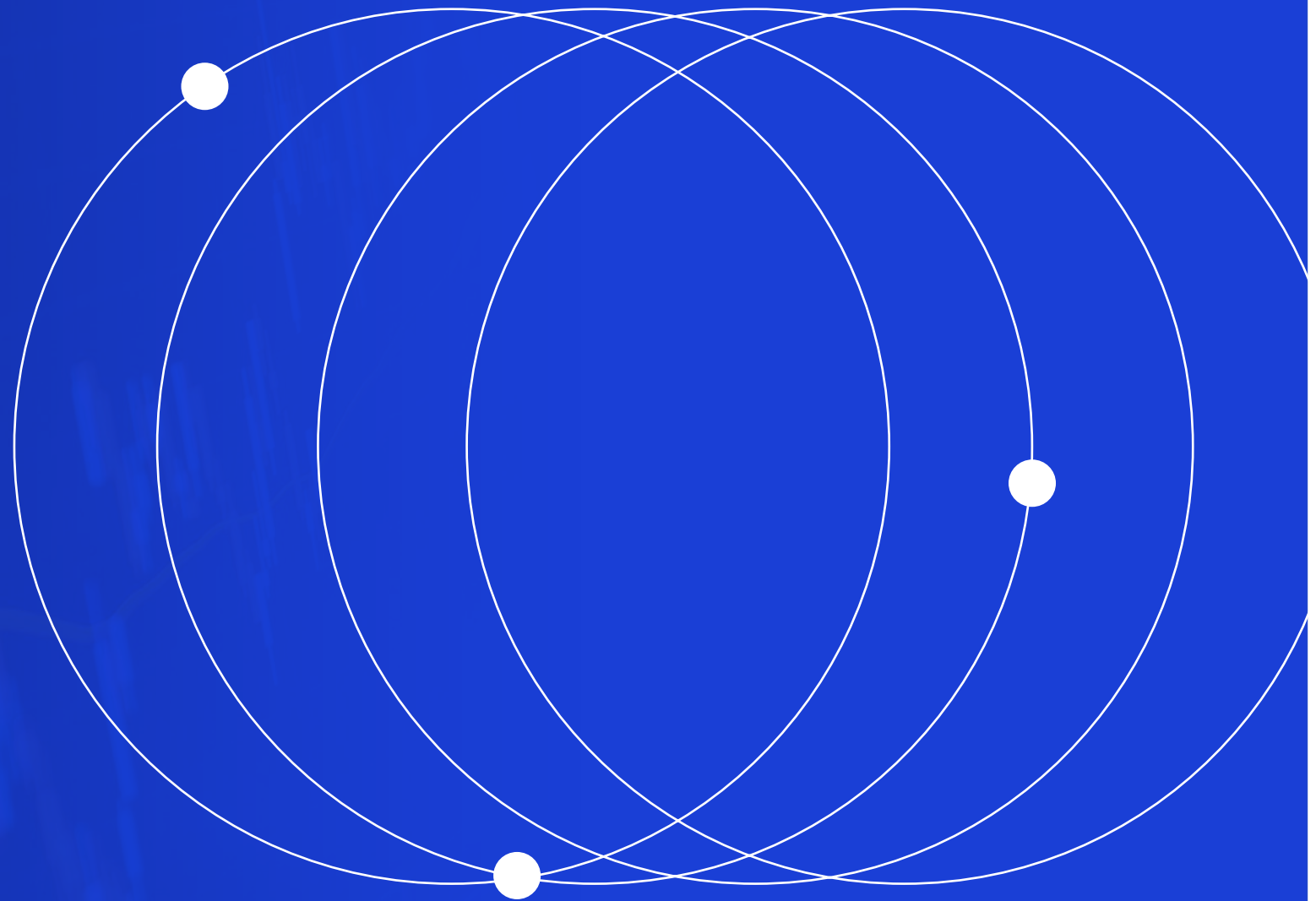






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# Key features

**Transform your reporting experience** with Total Plan Manager's Report Builder.

**Enjoy the convenience of creating customized reports** tailored to meet your specific requirements.

**Save time and effort on report setup and generation**—once you set up a report template, it can automatically generate on a recurring schedule.

**Enhance productivity and efficiency** with a tool that enables you to control and streamline your reporting process.

## Total Plan Manager's New Report Builder:

Your Solution for Effortless Customized Reporting

### Key Features



#### Extensive customization

Tailor reports with specific fonts, colors, page layouts, chart sizes, and branding.



#### Enhanced efficiency

Set up report preferences once to later generate customized reports with a single click on demand, or on a recurring schedule.



#### Seamless integration

Using your existing investment data without the need for data porting or additional onboarding.



#### Breadth of Functionality

Draws on the analytical range of the Total Plan Manager, including public and private-oriented functionalities.

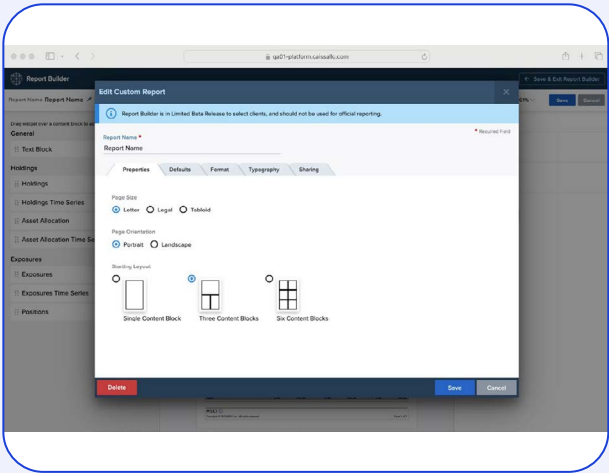


# How it works

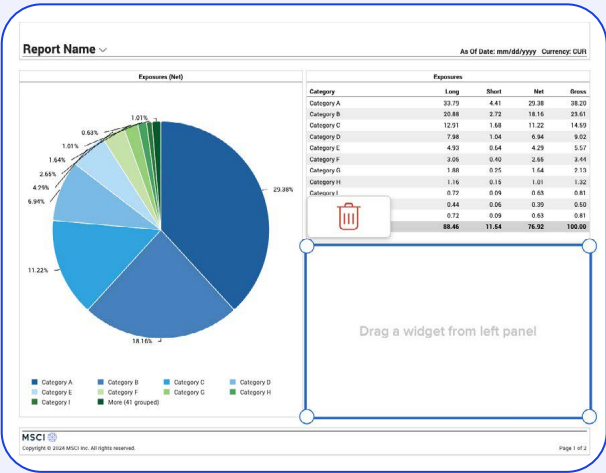
## Navigate Effortlessly

Setting up reports in Total Plan Manager's new Report Builder is designed to be as straightforward and intuitive as possible.

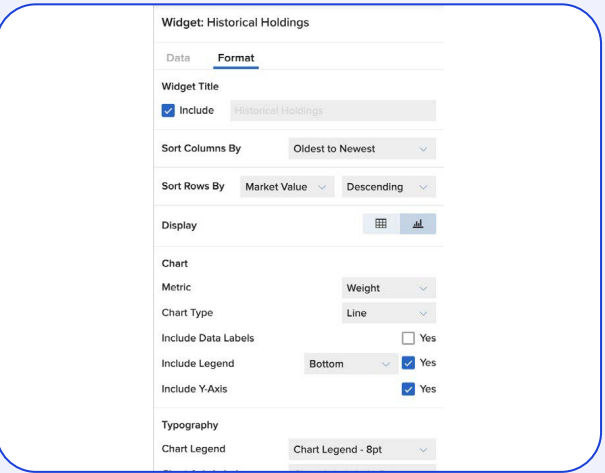
### 01 Setup Your Report



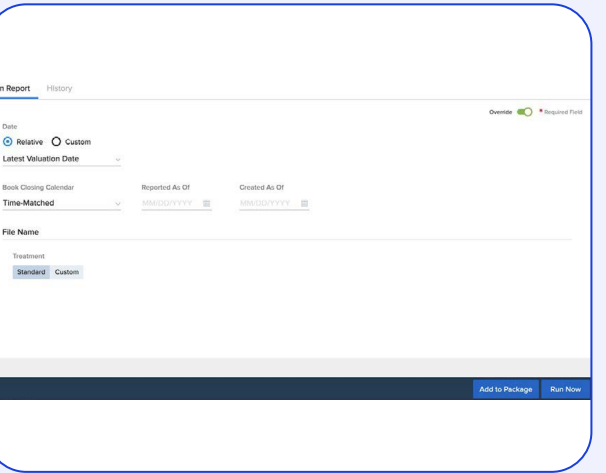
### 02 Design Your Layout



### 03 Customize Data and Format



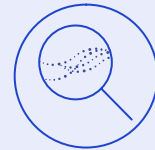
### 04 Schedule or Run on Demand





# Use Cases

01



## Build fund-level tear sheets

Effortlessly create detailed tear sheets to support manager monitoring and due diligence, providing clear and concise insights into performance and risk.

02



## Create asset class- and portfolio-level reviews

Develop in-depth reviews for boards and investment committees, delivering thorough analyses and presentations that can be tailored to their specific needs.

03



## Report to investors and beneficiaries

Generate timely reports to keep investors and beneficiaries informed, enhancing transparency and trust.



## 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

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