MSCI Wealth Manager

The solution to help win, serve, and retain sophisticated clients.

Important notice: This document is intended for institutional professionals and not intended to provide any investment advice or recommendation and must not be relied upon as such. Review the disclaimer at the end of this document.

MSCI

We turn data into insights that power better decisions.

MSCI strengthens global markets by connecting participants across the financial ecosystem with a common language.

Our solutions, built on over 55 years of experience and the latest advances in AI, support global investors in understanding risk and opportunity. They help our clients understand risks and opportunities, so they have the clarity to make better decisions and unlock innovation.

94 of top 100 pensions[1]

82 of top 100 banks[3]

98 of top 100 asset managers[2]

Our clients

Asset managers | Asset owners | Banks | Hedge funds | Insurers | Wealth managers | Corporates

Index

$21 trillion in AUM benchmarked to MSCI indexes.[4]

Over $2.4 trillion in AUM linked to MSCI equity indexes.[5]

Risk Analytics

Over 5.9 billion weekly average positions computed.[6]

Over 1,200 factor indexes, including flagship and multi-factor.

Private Assets

$17.8 trillion in private investments covered.

Over 29,500 funds and funds of funds.[7]

616,000 underlying investments.

Sustainability and Climate

Over 3,000 sustainability clients worldwide.[8]

$1.3 billion in assets benchmarked to MSCI Sustainability & Climate Indexes.[9]

Climate change metrics covering over 18,000 issuers.[10]

All data as of May 2026 unless stated otherwise. [1] World's largest pensions as determined by the report "Global top 300 pension funds" — a Thinking Ahead Institute and Pensions & Investments joint study. AUM and rankings calculated as of December 2024. Report published in September 2025. MSCI clients as of Dec. 31, 2025. [2] World's largest asset managers as determined by the report "The world's largest 500 asset managers" — a Thinking Ahead Institute and Pensions & Investments joint study. AUM and rankings calculated as of December 2024. Report published in November 2025. M SCI clients as of Dec. 31, 2025. [3] World's largest banks per SWFI (Sovereign Wealth Fund Institute) as of February 2026. MSCI clients as of Dec. 31, 2025. [4] Assets under management (AUM) as of Dec. 31, 2025, reported on or before March 31, 2026, using data from eVestment for active institutional funds and Morningstar for active retail funds. Equity ETF values were based on data from Refinitiv and MSCI. In addition, AUM includes indexed assets using available internal data. AUM includes notional open interest in futu res and options using internal data from MSCI. Active retail funds include open-ended funds, closed-ended funds and insurance produ ct funds. Active institutional AUM includes separate/segregated AUM, pooled/commingled AUM and mutual fund institutional AUM. AUM includes equity and multi -asset class funds and excludes feeder funds and funds of funds. Where an MSCI index is only a portion of a multi-asset class (MAC) or other hybrid or blended benchmark, AUM reflects the Morningstar data which allocates all AUM to the primary benchmark used in the MAC/hybrid/blended benchmark (which may undercount or overcount AUM linked to the MSCI portion depending on its weight in the benchmark). For funds where AUM was not reported as of Dec. 31, 2025, the previous period AUM was utilized as an estimate. [5] As of March 31, 2026. [6] As of January 2026. Represents average number of Analytics client positions processed in rolling seven -day period. [7] As of April 2026. [8] As of December 2025, client count is based on the shipping address of the ultimate customer utilizing the product, and affili ates, user locations or business units within a single organization are considered as separate clients. [9] As of December 2025, based on eVestment for Institutional funds, Morningstar for Retail funds and Refinitiv Universe for ETFs. [10] MSCI Sustainability and Climate data as of December 2025, based on eVestment for Institutional funds, Morningstar for Retail funds and Refinitiv Universe for ETFs.

Growth is the goal. Scaling is the problem.

The firms that win invest in the infrastructure that makes every advisor more capable. Most platforms weren't built for this moment. The clients in front of you expect more than what the legacy platform behind you can deliver.

The retirement cliff

~40%

of U.S. advisors will retire within a decade

The wealth transfer

USD124T

projected to transfer through 2048

The next generation

81%

of heirs plan to replace their parents' firm

The widening gap

100k

advisor shortage by 2034 as demand for professional advice outpaces supply

Leading wealth firms compete for the market's sophisticated clients with tools **not built for them,** so firms stitch together systems that still fall short. Leading wealth firms need intelligence, technology, and infrastructure that can scale with their growth ambitions and future proof their business.

MSCI Wealth Manager helps to win, serve, and retain sophisticated clients.

Growth is the goal. *Săaĭa aǧgụ'gáḅ'ǎãaĩḅļ ẹḅ-*

Convert HNW & UHNW prospects

Show institutional-caliber depth in the first meeting and win before they leave the room.

Grow inorganically

Extend your house views and governance across acquired books from day one, without losing investment discipline.

Scale personalization

Personalized portfolios across hundreds of relationships, with tax intelligence and private-asset coverage — infrastructure that scales.

Retain sophisticated clients through generations.

Clients leave when they stop feeling differentiated value. Proactive, intelligent decisions keep them.

An institutional investment engine, designed for wealth.

MSCI Wealth Manager extends your house views with institutional-grade analytics, tax-aware optimization, and proposal generation — across every client portfolio, at scale.

Your house views

Asset allocation, model portfolios, and the investment discipline your CIO already sets.

MSCI Wealth Manager

- HNW/UHNW prospect conversion
- Public + private asset risk analytics in one framework
- Total-portfolio intelligence
- Tax-aware optimization
- Proposal generation for HNW/UHNW clients

Every client portfolio

Personalized, tax-aware, and defensible — across public and private assets, at scale.

Powering your growth imperatives

Convert / Grow

Scale

Retain

Your Data + MSCI Institutional Grade Analytics = Confident Decisions

Built-in Integration

Integrates directly to popular reporting systems — Addepar, Orion, Tamarac, Black Diamond, and more.

Flexible Delivery

Use our interface today or work with our team to build API/MCP connections that suit your workflow.

- CRM
- Financial Planning
- Portfolio Reporting
- MSCI Wealth Manager:
  - Pre-Order Review
  - Portfolio & Account Rebalancing
  - Advisor & Enterprise Monitoring
  - Portfolio Construction
  - Portfolio & Account Alerts
  - Proposals
  - Model Support
  - Risk & Tax-Aware Optimization
  - Portfolio Analysis
  - Sales Enablement
  - Portfolio Insights
- OMS
- Downstream Systems

MSCI

CIO / Investment Team

The best investment teams don't just build house views — they enforce it across hundreds of advisors and thousands of accounts, without sacrificing the personalization that keeps HNW/UHNW clients.

That is exactly what MSCI Wealth Manager delivers.

Set the houseviews

Firm-wide model portfolios and custom CMAs that express your investment strategy.

Define the guardrails

An approved asset universe — including non-public assets — that advisors work within.

Enforce discipline at scale

Automated monitors flag drift and misalignment across every account, continuously.

Stay ahead of markets

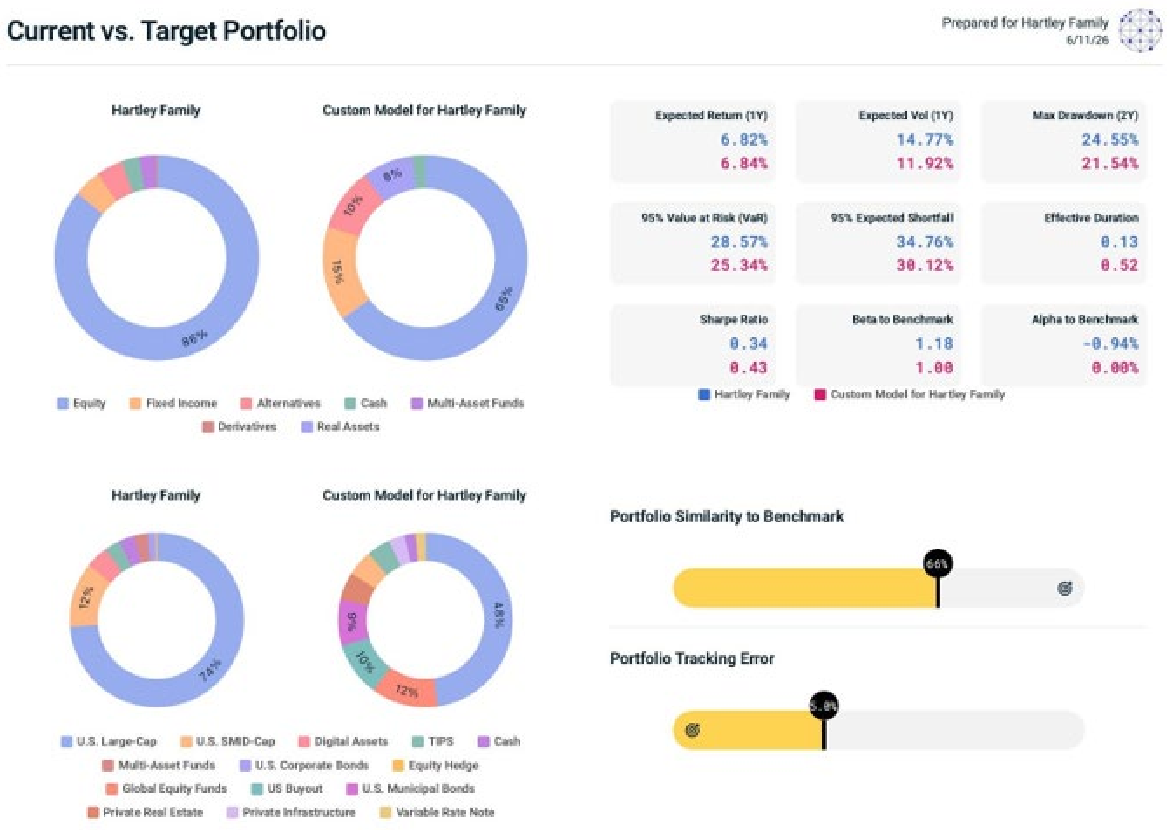
Forward-looking analytics, stress testing, and scenario analysis to evolve the house views.

Consistency Across Acquired Books

Every RIA acquisition brings a book of client portfolios built on different models, different tools, and different investment logic. Aligning them to your house views has historically meant months of manual migration, inconsistent risk profiles, and an integration tax that eats into the value of the deal.

MSCI Wealth Manager closes that gap. The same framework that analyzes your existing clients is designed to instantly map any incoming book to your targets — scoring each portfolio against your house views and identifying where attention is needed.

The result: CIO-level visibility across the combined book, with every acquired client already aligned to your investment framework.



Note: System excerpt for illustrative purposes only

Advisory Teams

Sophisticated clients judge you on two things at once — the quality of your advice and how personal it feels. Delivering both across a growing book is where most advisors *run out of hours*.

MSCI Wealth Manager gives you differentiating preparation and personalization on every client — at scale.

Win the next meeting

Spot ways to strengthen a prospect's portfolio before the first meeting even ends.

Retain your best clients

Build portfolios around each client's tax, legacy holdings, private assets, and risk preferences.

Scale your book

Monitor hundreds of relationships at once, with monitors that flag who needs attention before they call.

Deepen walletshare

Capture held-away assets — only 14% of HNW/UHNW clients have one advisor managing most of their wealth.

Trusted by wealth firms competing for sophisticated clients.

CALLAN FAMILY OFFICE

By unifying public and private asset insights in a single platform through MSCI Wealth Manager, Callan Family Office was able to deliver personalized, risk-aware portfolio guidance at scale across their client portfolios.

See Full Case Study

PNC

MSCI and PNC Bank worked together to give PNC's financial advisors access to MSCI Wealth Manager, an integrated platform for portfolio construction, risk analytics, and personalized client proposals, enabling advisors to deliver more tailored investment experiences at scale.

Read Press Release

SNOWDEN LANE PARTNERS

Snowden Lane Partners integrated MSCI Wealth Manager into its advisory ecosystem to give its advisors advanced portfolio analytics, risk decomposition, private asset coverage, and personalized proposal generation tools to better serve clients as the firm continues to grow.

Read Press Release

Win

Accelerate Prospect Conversion

Prepare →

Know Their Portfolio Before You Walk In

Note: System excerpt for illustrative purposes only

The advisor who wins walks into the first meeting prepared, not guessing, which keeps the competitive framing, but ties it to preparation, not to owning unique information.

MSCI Wealth Manager’s PDF Statement Reader uses AI to instantly extract, normalize, and analyze portfolio data from prospect statements — eliminating manual prep.

It collapses the time from prospect contact to actionable proposal from days to minutes — a capability most directly tied to client acquisition.

PDF

Prospect Holdings

Name	Qty	Stmt P...	Stmt Value	Cost B...	Acq D...	Hld Pe...
Portfolio 1	1558	$939.47	$517,370.30	$75,000.00		
Account 1 Taxable	558	$518.55	$96,450.30	$60,000.00		
APLD.OQ - APPLIED DIGITAL CORP	200	$172.85	$34,570.00	$15,000.00	02/05/24	Short
AAPL - Apple	158	$172.85	$27,310.30	$30,000.00	02/05/24	Short
NVDA - Nvidia Corp	200	$172.85	$34,570.00	$15,000.00	02/05/24	Short
+ Add Asset						
Account 2 Taxable	1000	$420.92	$420,920.00	$15,000.00		
LIN - Linde PLC F	1000	$420.92	$420,920.00	$15,000.00	02/08/24	Short
+ Add Asset						
+ Add Account						
Portfolio 2	970	$11,496.08	$404,599.40	$105,000.00		
Account 3 Taxable	520	$122.54	$63,720.80	$15,000.00		
COP - Conocophillips	520	$122.54	$63,720.80	$15,000.00	02/09/24	Short
+ Add Asset						
CI - CIGNA Corp	130	$343.66	$44,675.80	$15,000.00	02/12/21	Long
BKNG - BOOKING HOLDINGS	20	$3,447.52	$68,950.40	$15,000.00	02/11/21	Long
CI - CIGNA Corp	130	$343.66	$44,675.80	$15,000.00	02/12/21	Long
BKNG - BOOKING HOLDINGS	20	$3,447.52	$68,950.40	$15,000.00	02/11/21	Long
CI - CIGNA Corp	130	$343.66	$44,675.80	$15,000.00	02/12/21	Long

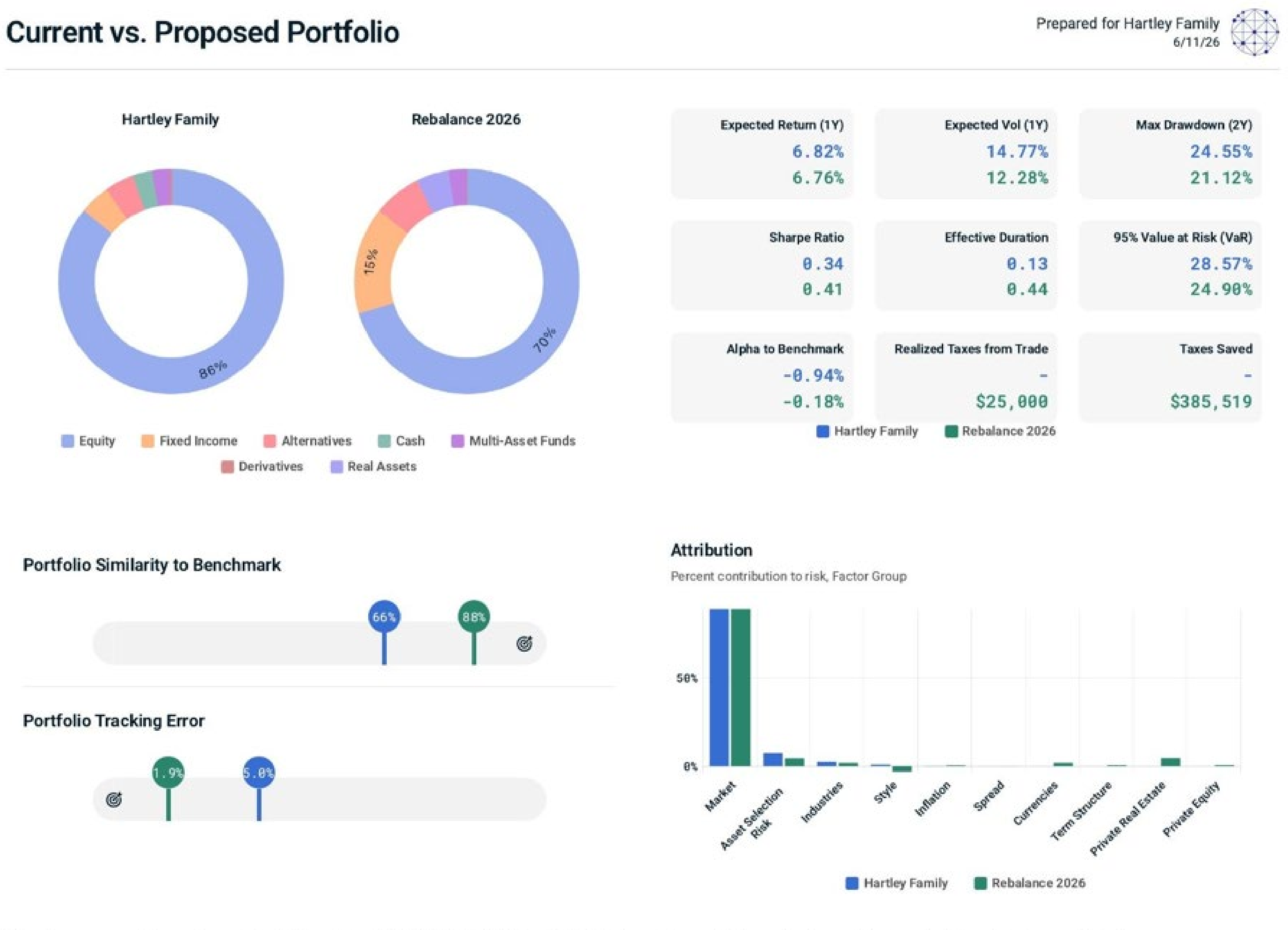
Prove →

Tax Aware Portfolio Transition

Embedded gains, concentrated positions, and client-specific constraints make moving an existing portfolio look costly and complex, and that friction keeps your prospects from making a change.

MSCI Wealth Manager handles it automatically — tax- and risk-aware optimization that maps each prospect’s current holdings to your target portfolio, respects their individual constraints, and generates a proposal showing exactly what the transition looks like.

The prospect sees a clear, tax-smart path from their portfolio to yours. Manual workflows and bolt-on tools are rarely able to match it.



Risk and factor exposure outputs, as well as scenario projections, are based on MSCI's MAC Factor Model. Scenario simulations incorporate user-provided assumptions for expected returns and cash flows. All results are model-based

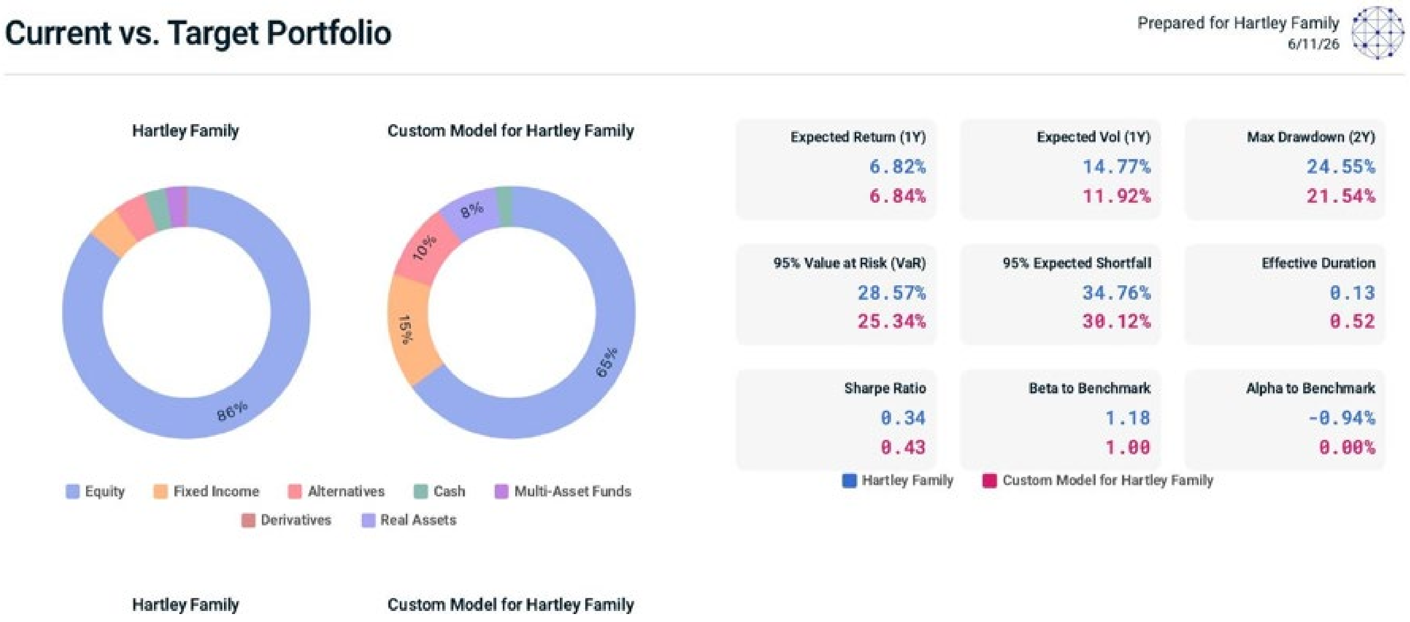
Prove →

The Total Portfolio— Public and Private, Analyzed Together

For sophisticated clients, private markets make up an increasingly large portion of the portfolio — yet those holdings sit outside the risk analysis entirely. So every risk figure the client has seen reflects only part of their wealth — never the whole picture.

MSCI Wealth Manager closes this blind spot with Total Portfolio Intelligence — the impact of public and private holdings analyzed side by side in one institutional-grade risk framework, powered by MSCI MAC analytics.

Your advisors now can show — and manage — a prospect's entire wealth. Few platforms give advisors this level of visibility.



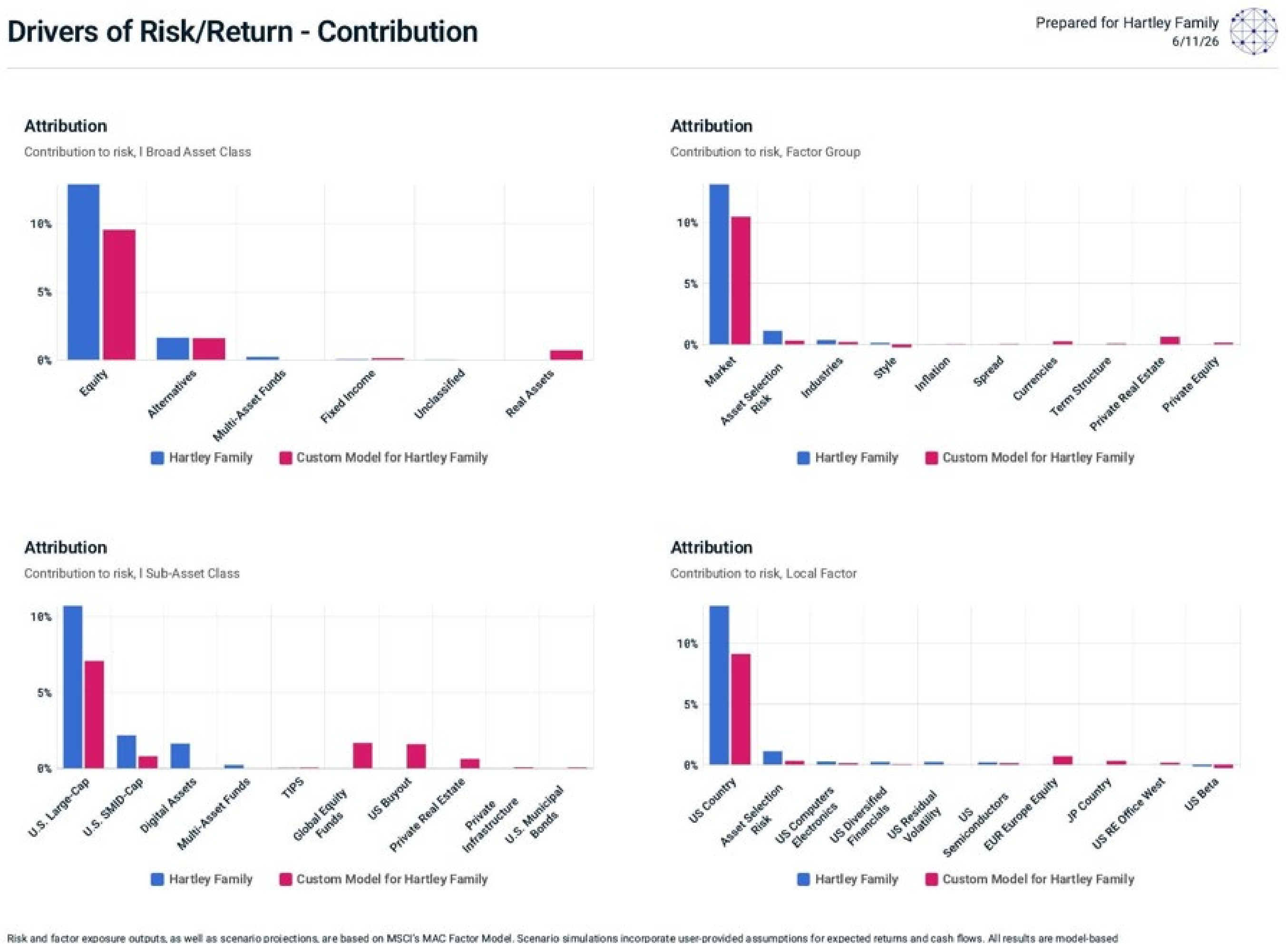
Note: *System excerpt for illustrative purposes only*

Prove →

Risk Decomposition: What's Really Driving the Risk

Show the prospect what's really inside their portfolio — the factor exposures, concentrations, and correlations driving their risk, decomposed with MSCI's analytics.

It's the institutional X-ray most advisors can't run — the clearest proof your advisors understand the portfolio and its alignment to that client best.



Note: *Illustrative MSCI Barra factor exposures*

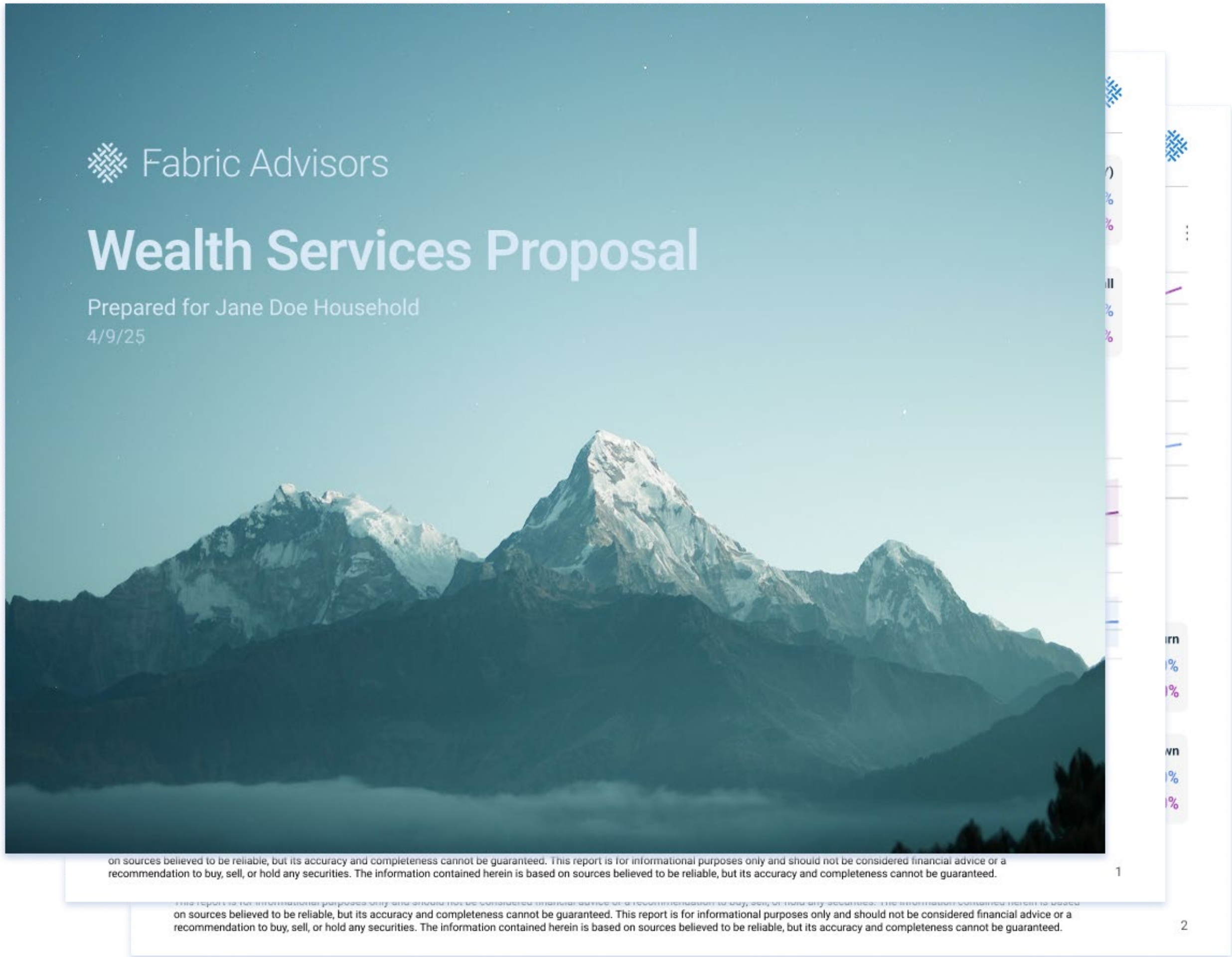
The Winning Proposal

Every proposal is powered by MSCI's intelligence — trusted by the world's largest institutional investors, now working for your advisors and their clients.

It turns MSCI's industry-leading intelligence and insights into clear, personalized recommendations — built around each client's total portfolio (public and private holdings alike), optimized for tax-aware outcomes, and aligned to your firm's house views.

You arrived prepared. You proved your depth. This is the moment the prospect becomes a client.

That's substance that's difficult to replicate, simplified to resonate with your audience.



Note: Example for illustrative purposes only

Retain & Expand

Retain the Relationship.
Win the Whole Wallet.

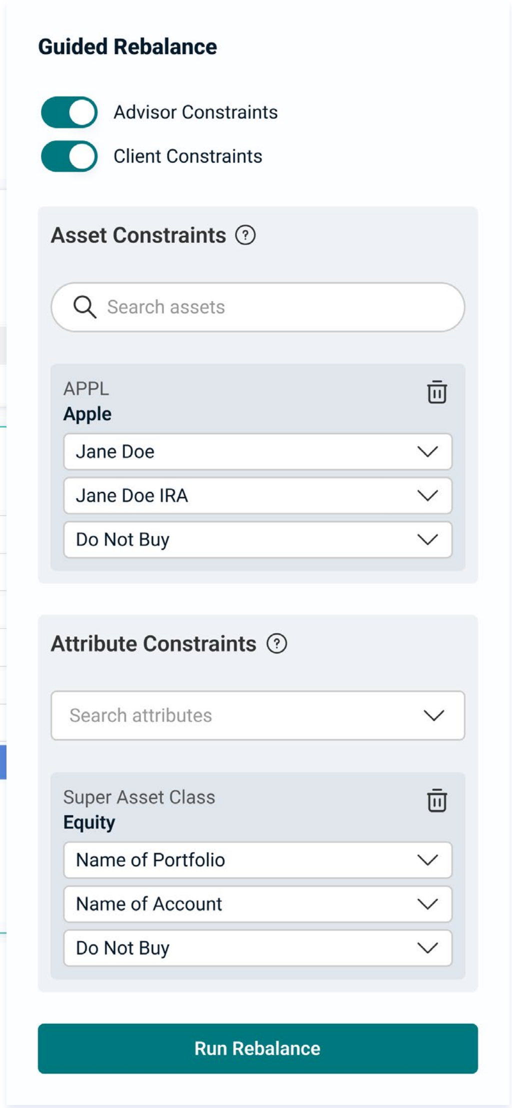
The Infrastructure to Bring Institutional Rigor to Every Relationship

Every relationship deserves investment intelligence translated into personalized portfolios. Most firms can only give that attention to the top of the book.

Analytics depth — factor-level risk decomposition, tracking error and concentration run continuously on every portfolio, not just flagship accounts.

Personalization at scale — the infrastructure to support each client's unique wants and needs, from generation to generation.

The result — the same evidence-based diligence, for every relationship, every generation, independent of account size.



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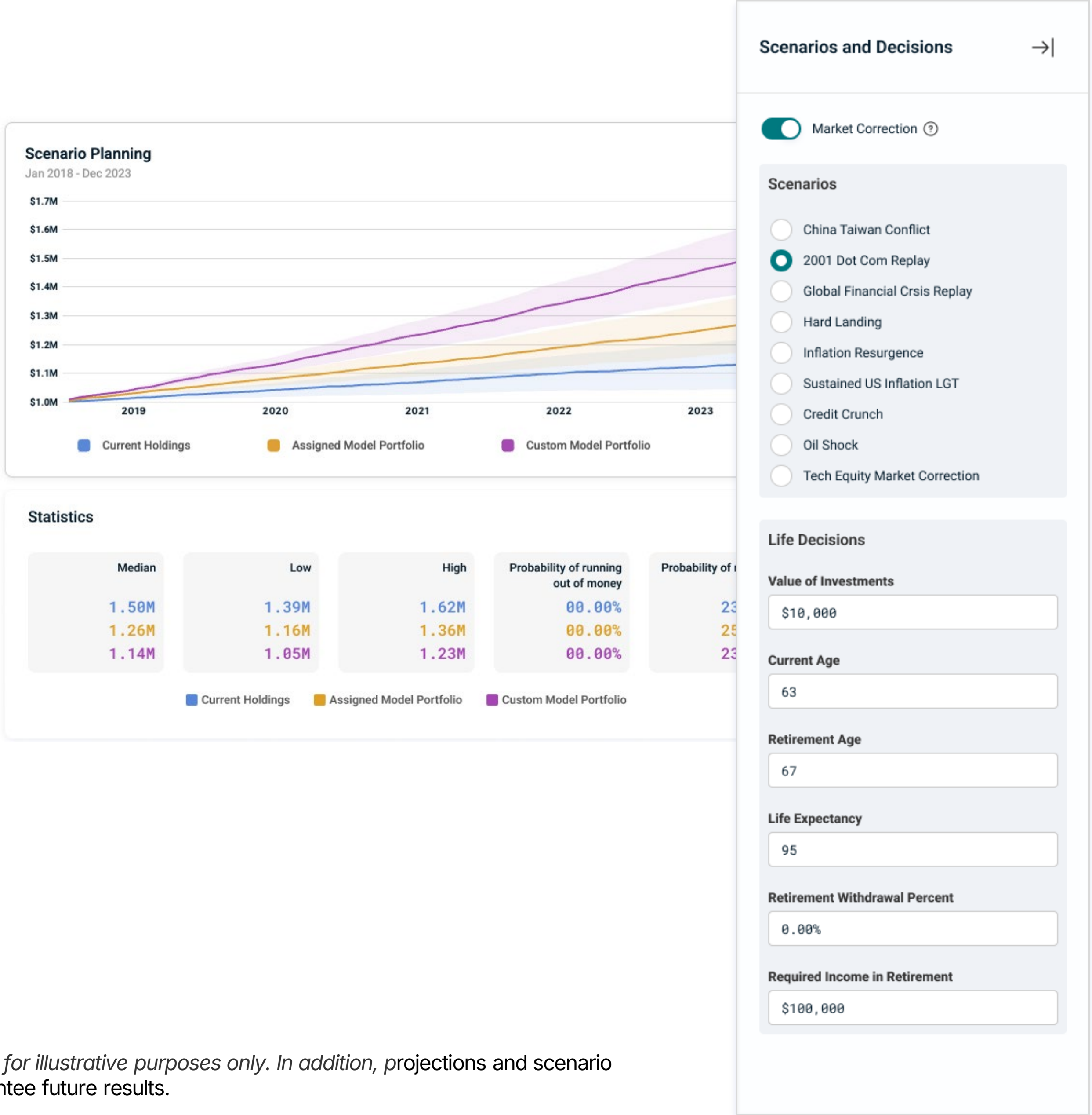
Expand →

Win the Entire Relationship

One model, full picture — public and private holdings are analyzed together so positions other advisors can't model finally show up in the picture.

Their whole wealth — factor exposure, risk decomposition, concentration and drawdown risk — are calculated across everything the client owns, not just the account in front of you.

Scenario Analysis — run the consolidated scenario live, in the meeting — show the value of bringing everything to you.



Note: System excerpt for illustrative purposes only. In addition, projections and scenario analysis do not guarantee future results.

The Real Competitor Is the Clock

Kitces Research finds advisors spend more than 2 hours behind the scenes for every 1 hour in front of a client.

Most of that time isn't spent thinking about the client — it's spent pulling their picture together from fragmented tools.

One workspace — portfolio analytics, risk decomposition, and models live in one platform, so prep doesn't mean stitching together different systems.

Every hour back is an hour with a client — and client-facing time is what actually retains and expands a relationship.

MSCI Wealth Manager helps your advisors explain each portfolio with confidence.

2+ : 1

hours spent behind the scenes for every hour spent with a client

Source: Kitces Research, "How Do Financial Advisors Actually Spend Their Time?"

The Annual Review Is Where Relationships Are Renewed

A client expects one thing from this meeting: what changed, why, and whether the plan still fits them and their family.

Walking in prepared makes the relationship feel indispensable.

How — the same infrastructure that keeps every portfolio current and every household's picture complete turns that prep into a story you can tell with confidence — this year's changes, this year's alignment, and what's next.

What changed and why

This year's portfolio moves.

How the plan still fits

Risk, goals and constraints checked against where they are today.

What's next for the family

The conversation that keeps the relationship through the next generation.

Serve

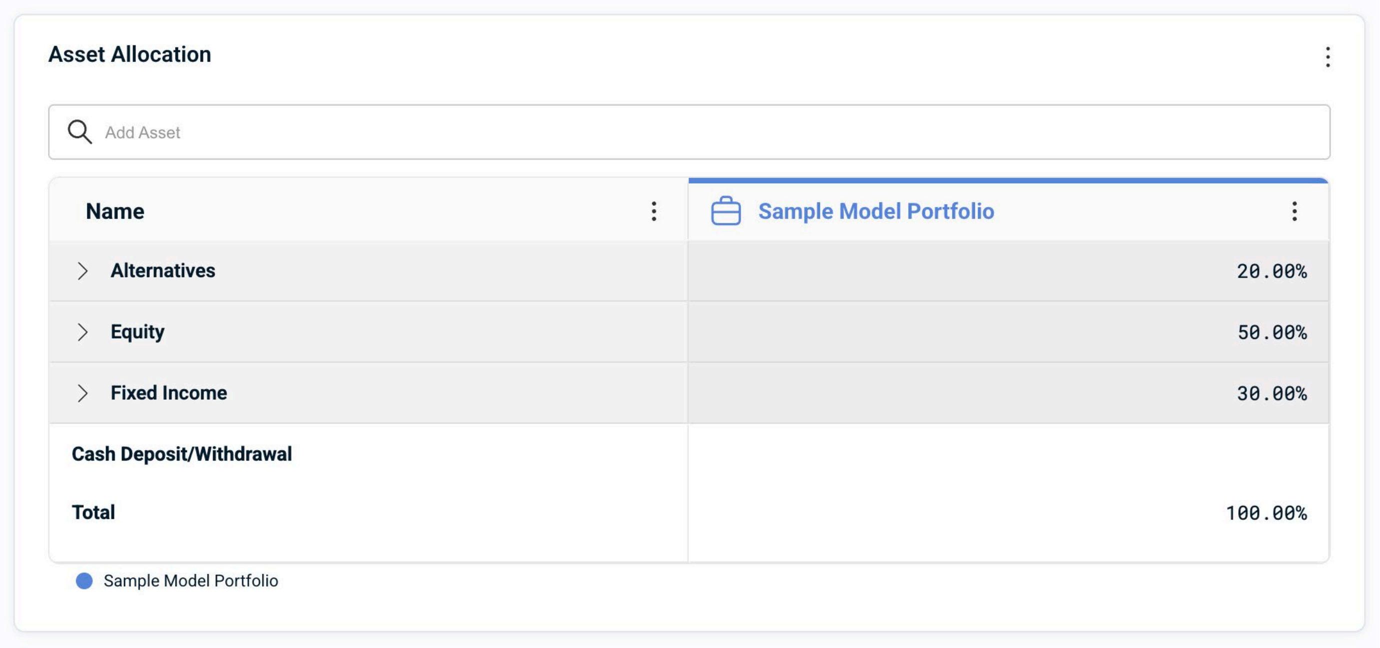
Design and Monitor Portfolios at Scale

MSCI Intelligence—Built Into Every Model Portfolio

Every model starts with MSCI's institutional-grade data, research, and analytics — a differentiated foundation built into every portfolio you construct.

Build multi-asset model portfolios in minutes, deploying strategic house views across every client so your advisors can move from house view to client-ready in *minutes*.

The result: your house views applied consistently across every client, with personalization allowed within the guardrails your firm defines.



Note: System excerpt for illustrative purposes only

Create Custom Portfolios Aligned with Firm Models

Personalization used to mean trading speed for quality — not anymore.

Advisors customize each client's target portfolio in just a few clicks, while staying anchored to the firm's house view — tracking drift at every level.

The result: every client's portfolio is built fast, aligned, and bespoke.

Note: System excerpt for illustrative purposes only

Serve →

Modeling Private Assets in Multi-Strategy Portfolios

For your most sophisticated clients, private assets aren't a one-time conversation — they're a growing share of the portfolio you're responsible for managing every day.

MSCI Wealth Manager lets investment teams build, adjust, and monitor portfolios that account for the impact of private positions — modeled side-by-side with public assets using MSCI's institutional-grade risk framework.

The result: the same rigor that won the relationship is now built into how you manage it — every day.

Statistics

Expected Return (1Y)	Expected Vol (1Y)	Max Drawdown	Sharpe Ratio
6.43%	10.98%	24.17%	0.43

Asset Allocation

Add Asset

Name	Cohan Family
Alternatives	100.00%
Hedge Funds	29.88%
Private Equity	34.40%
Private Cashflow	9.26%
Commodities	5.89%
Public Real Estate	20.58%
Cash Deposit/Withdrawal	
Total	100.00%

Cohan Family's Household

Note: System excerpt for illustrative purposes only

Serve →

Does the Portfolio Behave Like the Target?

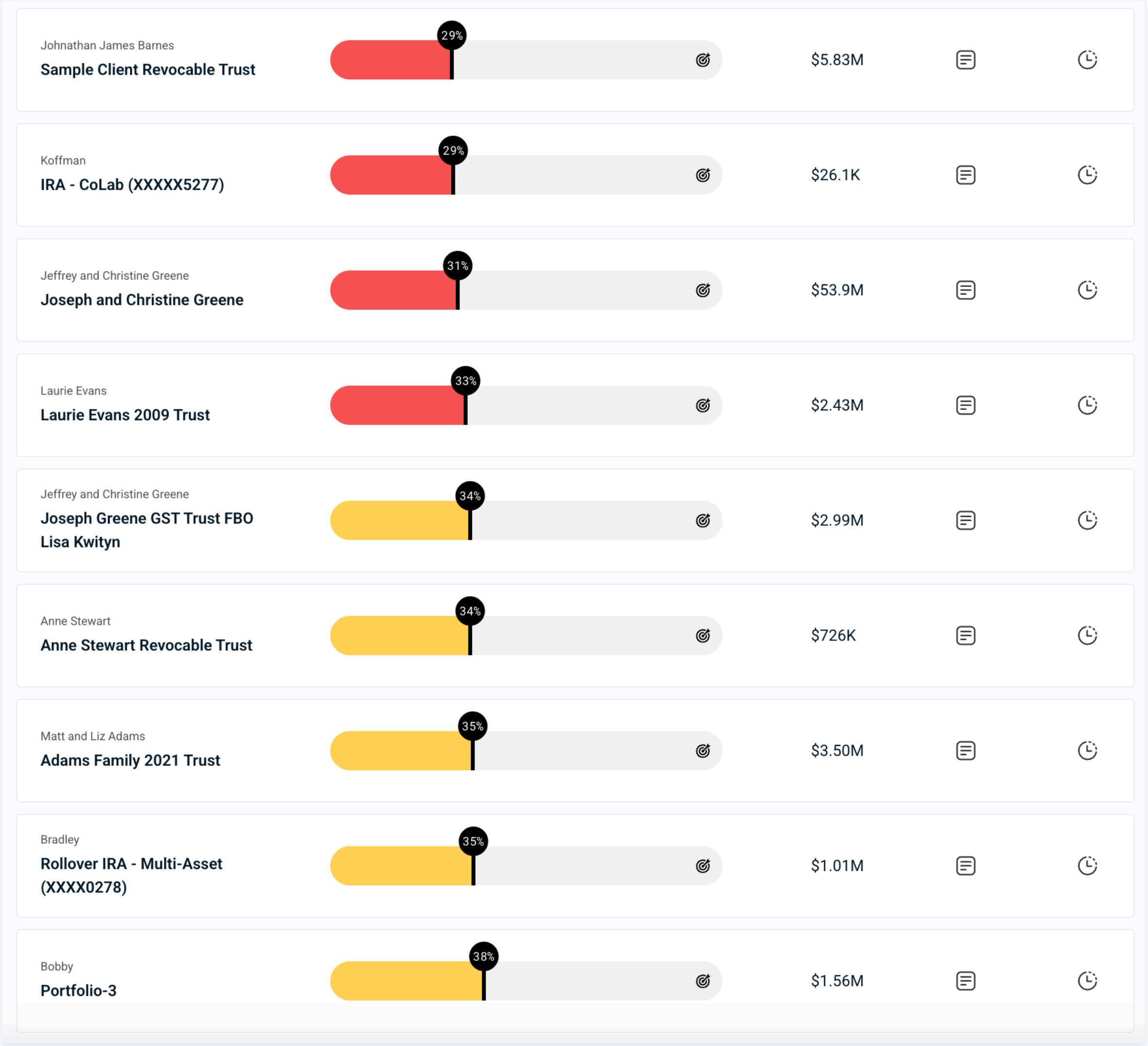
That's exactly what the MSCI Similarity Score measures — not whether holdings match, but whether behavior does.

A proprietary, factor-based score that captures the full behavioral alignment of a portfolio to a benchmark or target risk/return profile, not just tickers and weights.

Two portfolios can hold entirely different securities and still behave nearly identically. Holdings-based tools typically miss this.

MSCI Similarity Score empowers true personalization at scale.

The result: CIOs get governance, advisors get flexibility, and every client gets personalization and clarity.



Note: System excerpt for illustrative purposes only

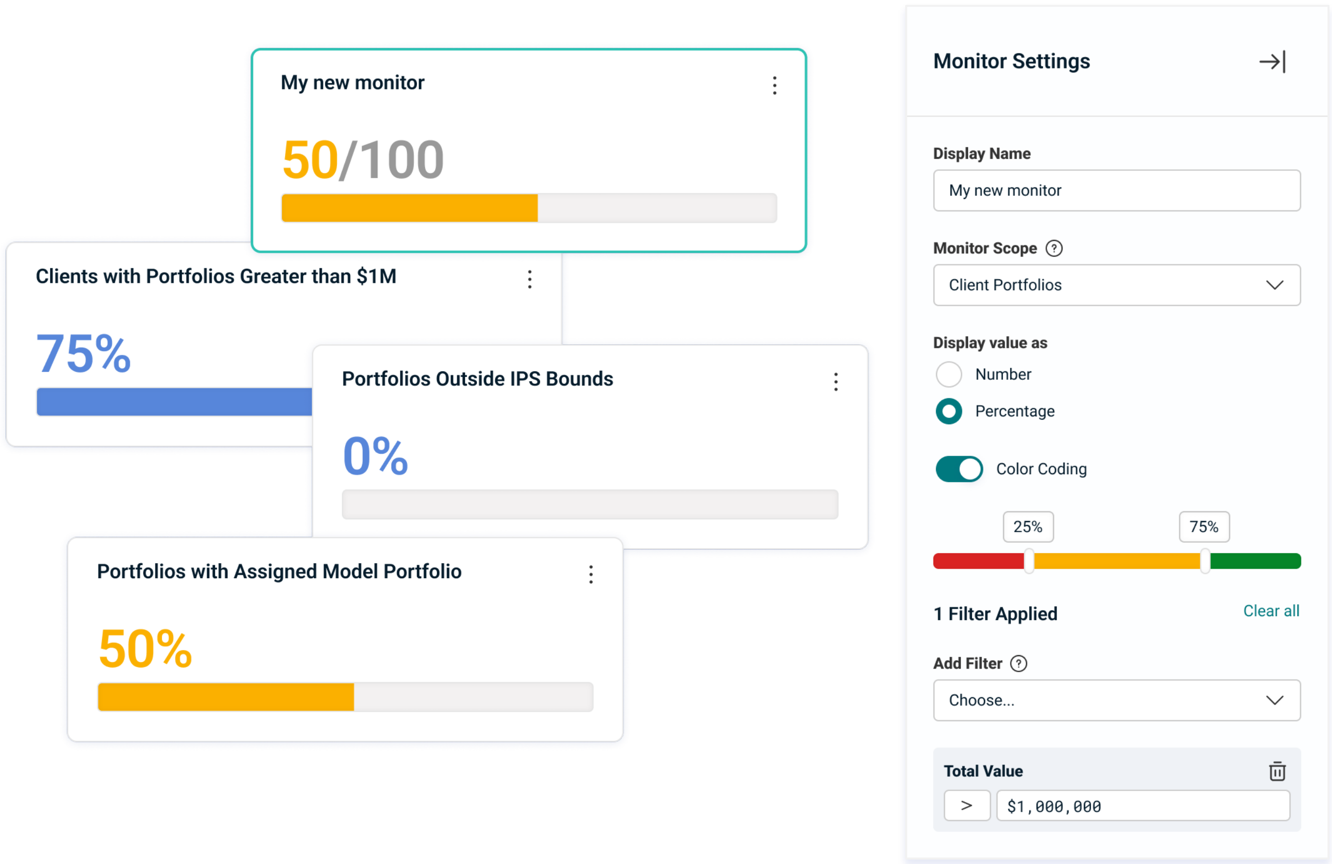
Serve →

Proactive Management, Intelligent Prioritization

Scaling used to mean more manual review, more headcount, and more risk — not anymore.

The home dashboard is a fully customizable, role-aware control center — dynamic and actionable — surfacing alerts (excess cash, drift, IPS bounds, exposures, and many more) in real time.

The result: you scale through intelligent prioritization — so advisors know who needs their time and attention on a daily basis and spend time on the conversations that grow the relationship.



Note: System excerpt for illustrative purposes only

Thank you.

Appendix

Potential MSCI Wealth Manager Enhancement Themes

Providing an intelligence layer to enhance complex client portfolio conversations — integrating MSCI's proven institutional data, content, and models into a fit-for-purpose experience for wealth managers.

AI-First Usability Workflows

Incorporating advanced AI capabilities to empower advisor understanding and how to communicate portfolio changes to clients.

Expansion of Private Asset Content and Analytics

Deeper private asset intelligence expanding our total portfolio capabilities with enhanced cash flow forecasting, universe ranking, and richer analytics designed for the full complexity of high-net-worth allocations.

Tax Optimization

Reallocation intelligence capabilities to enhance client tax alpha conversations.

Advanced Risk Analytics

Deeper asset and scenario stress testing and forecasting for better proposals — bridging high-level investment strategy and individual client goals.

Note: All MSCI Wealth Manager enhancements described herein are proposed updates and remain subject to change.

Contact

The process for submitting a formal index complaint can be found on the index page of MSCI's website at: https://www.msci.com/index-regulation.

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MSCI (NYSE: MSCI Inc.) 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.

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