

## MSCI Wealth Manager | Explainer Video

### Transcript

Client expectations are evolving.

Today's investors want portfolios customized to their unique needs, goals and preferences.

But how can wealth management firms scale that level of personalization, while ensuring portfolios still reflect firm-wide models and investment strategies?

Introducing MSCI Wealth Manager — a portfolio management platform that empowers wealth management firms to deliver personalized client portfolios at scale.

MSCI Wealth Manager helps you build, monitor and personalize client portfolios — across both public and private assets — while remaining consistent with house views.

Design dynamic model portfolios, track drift, generate rebalancing insights and support personalized investment proposals — all in one place.

But what truly sets MSCI Wealth Manager apart?

At the heart of the platform is our proprietary MSCI Similarity Score — a factor-based methodology that looks beneath the surface of portfolio holdings.

Rather than matching exact holdings, the Similarity Score measures alignment based on risk and return characteristics at the factor level — comparing client portfolios to model portfolios or benchmarks on a behavioural level.

This enables flexible rebalancing, supports advisor discretion and helps keep clients aligned with the firm's core strategies, even as they seek customization.

All with one simple, common score.

With built-in proposal generation and reporting tools, you can turn data into customized insights — supporting more meaningful, data-driven conversations with clients.

Whether you're focused on portfolio construction, rules-based rebalancing or sales enablement, MSCI Wealth Manager equips you with the tools to deliver at scale.

Get the tools to empower your teams and personalize at scale.

MSCI Wealth Manager.

Visit [msci.com/wealthmanager](https://msci.com/wealthmanager) to learn more.

## Contact Us

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

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