

InvestEdge's Integrated Data Solutions

Increase both the productivity of your investment professionals as well as quality of client reporting by integrating data from numerous sources into a single solution. Use automated interfaces to eliminate the data inconsistencies that are common with multiple systems or with manual processes.

Access to third-party tools and critical data.

- Data is leverageable across all functions from portfolio analysis to client reporting. Advisors can leverage this information to make informed decisions and communicate them to clients from a single solution. InvestEdge provides easy-to-use tools that simplify daily tasks and provide streamlined access to account and security information.

Market Indices / Benchmarks

- Access to leading providers of distributed index data providing you a range of indices and other benchmark solutions to satisfy your requirements.

- Morningstar
 - Indices
 - Categories
- S&P
- Russell
- Thomson Reuters
- Informa Peer Universes

Corporate Actions

- Interactive Data (IDC) is a leading provider of timely, high-quality information on global corporate actions for numerous event types to enhance your accounting data.

Risk Analytics

- Optimizer and risk models are integrated for automated rebalancing and risk monitoring of portfolios, enabling you to create a portfolio that delivers more return for each level of risk and client preferences.

Equity Analytics

- Customize the data you need to drive your investing and reporting.
 - Factset
 - Thomson Reuters
 - Morningstar
 - Telemet

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Learn more at www.investedge.com

ENHANCED DATA INTEGRATION *CONTINUED*

Fund Data

- Data feeds strengthen activities such as: financial modeling, creating investor-friendly communication materials, and delivering industry-standard statistics.

- Morningstar
- Proprietary

Fixed Income Descriptive Data

- Solutions that provide comprehensive, insightful and useful fixed income analysis designed to deliver critical support to the investment decision and risk management process.

- Thomson Reuters
- IDC BondEdge

Ratind Data

- Access to the industry leaders in providing in-depth third-party analysis of Stocks, Funds, ETF's and Bonds.

- Thomson Reuters
- Morningstar

Manager Models

- InvestEdge provides access to proprietary and 3rd party manager models, supporting customization of your investment solution for clients. Our open architecture solutions import external manager models into the InvestEdge platform to support all your investment decisions.

- MMxCHANGE
- Proprietary
- Select Managers
- Federated

Quotes

- Real time stock quotes and market data for U.S. equities traded on BATS Exchanges.

- Xignites
(included with Portfolio Management)

Manager Research

- Advisor access to Model Performance profiles, market research, allocation changes, and approved customer communication content to enhance your delivery of investment advice.

- Federated



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