

MSCI Sales Enablement Tools

Tools for elevated Adviser conversations and more effective product distribution

Asset Management is undergoing a transformation. At the heart of the change is the growth of index products, sustainability, and wide product proliferation. While performance and cost are key drivers in gaining a competitive advantage, elevating conversations with Financial Advisers will help your distribution team differentiate your product offerings and strengthen key relationships.

Differentiated insights to stand apart from the crowd

Use our tools with Financial Advisers to efficiently distribute your firm's best ideas with:

- **Differentiated content:** Provide insights to your Advisers by bolstering typical drawdown, performance, and returns-based analytics with climate risk, ESG research, Barra factors, optimization, and stress testing
- **Customization:** Stand out from competitors' with fully customized and branded reports
- **Intuitive user experience:** Quickly and accurately analyze competing strategies and allocations, and provide recommendations to improve outcomes
- **CRM integration:** Single sign-on integration with existing CRM system to link directly to a prospect's accounts
- **Adviser insights:** Aggregate data to better understand your own and competitors' product usage, user behavior, and asset flows
- **Breadth of coverage:** Over 300,000 mutual funds and over 7,000 ETFs; global coverage

Communicate with intuitive & customizable portfolio analysis



- Compare products vs. competitive offerings
- Perform what-if and optimizations to evaluate portfolio changes



Custom reports Tailor your conversations, strengthen relationships



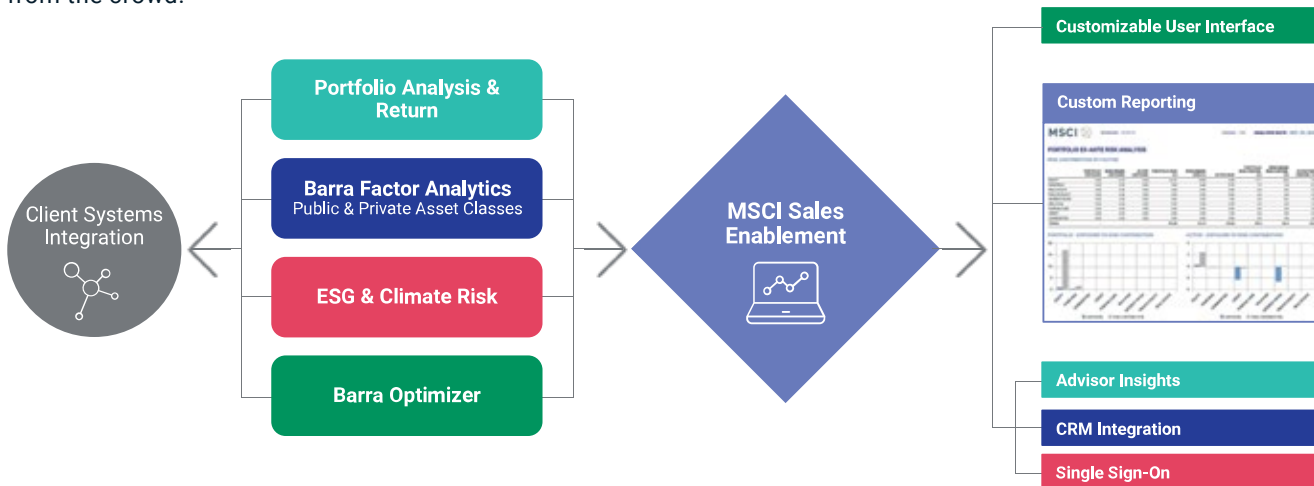
Why MSCI?

Trusted Name in Institutional Asset Management

- Stable and robust process you can confidently build around
- Managed Solutions to support your data management architecture & operations
- Institutional-quality portfolio analytics to drive sales opportunities
- From single asset class to MAC portfolios and solutions

Deliver Insights with MSCI Content

MSCI delivers differentiated content bolstered by climate and ESG data, allowing you to tell your story to stand apart from the crowd.



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 www.msci.com.

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