

MSCI AI Portfolio Insights

Insights that support impactful collaboration with efficiency and scale.

MSCI AI Portfolio Insights delivers automation and cutting-edge distribution to increase speed in risk management, driving efficiency and enabling proactive investment team engagement. This is made possible with our leading risk models, high-quality data, and modern data warehousing.

Adding Value to Risk and Performance Management

Traditionally risk teams have had to spend immense time and resources integrating complex solutions to process, clean, generate, store, and extract data, to provide an overview of risk and performance. Today, they need to acquire and process vast amounts of data at speed to make more informed decisions, which can be achieved through modern and scalable technologies.

Technologies like cloud services and results storage can transform large volumes of disparate data into synthesized information which can be quickly analyzed across the organization. With AI Portfolio Insights, we provide investment teams with access to a broad view of the overall levels of risk and performance in their portfolios, how these levels have changed over time, and what were the main drivers of these changes.

Integration of generative artificial intelligence (GenAI) tailors our solution to surface the most important changes to users' portfolios. Powered by leading risk and factor models and history in natural language processing and machine learning, AI Portfolio Insights is designed to reconstruct the risk management process.

Automating Insights to Drive Decisions

With a modern technology infrastructure, the solution supports increased efficiency and speed by reducing the operational burden through an optimized extraction, transforming, and loading process. With access to insights powered by GenAI, risk teams can reallocate time and resources to delivering higher value to investment teams.

AI Portfolio Insights intakes client portfolios and leverages our current calculation engines to provide statistics and analytics to a cloud-enabled warehouse. Risk teams can access the results directly through expertly designed data models integrated into Snowflake. Overarching governance principles through data methodology, cataloguing, data structure, quality assurance (QA) methodologies, and data receipts help maintain data consistency and quality. Interactive dashboards transform this data into visualizations that are easy to understand and communicate.

Get a dynamic and intuitive view of risk and performance powered by our data, analytics and research driven content.

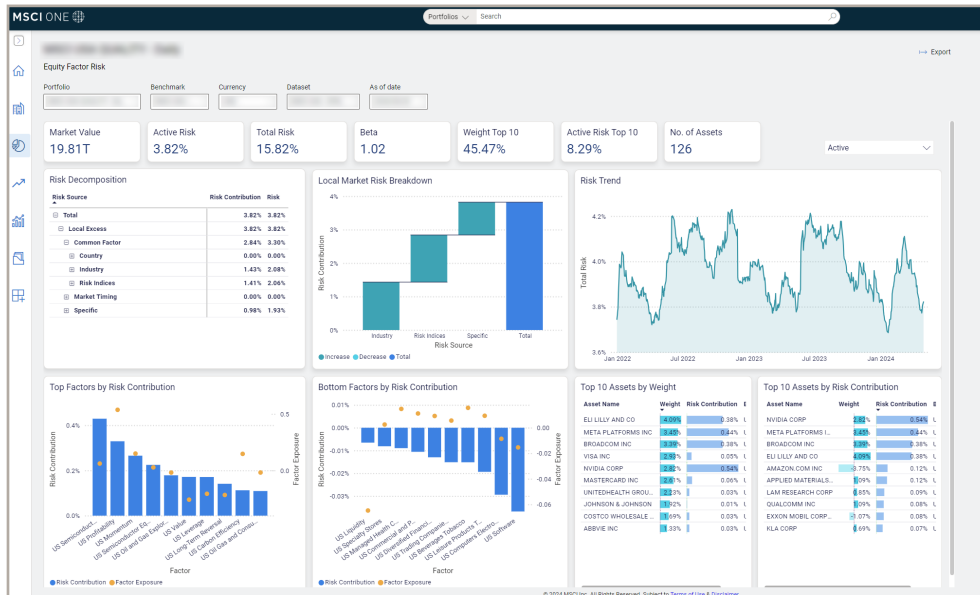
Use a scalable and dynamic data model which facilitates easy data retrieval and flexible expansion of content storage.

Access AI-assisted analysis on the most important drivers of equity risk on your portfolios using GenAI.

Integrate cloud technology to gain fast and easy access to your data.

Easily communicate across the organization through curated dashboards or direct access to the data warehouse.

Enhance your risk and performance processes with the integration of our content across Index, Sustainability, and Real Assets.



Flexible visualization through a curated set of standardized dashboards that leverage your own custom parameters and configurations.

Purpose-built cloud-based dynamic data models that enable easy storage and extraction of results.

Concentration analysis: Easily find concentrated positions, sectors, factors, or portfolios.

Attribution of changes: Did the risk of the securities change or did my portfolio change? Quickly understand the factors driving the risk of your portfolio over time.

Trend analysis: Analyze how your portfolio has changed over different periods and regimes and discern what is driving those changes.

Outlier identification: Quickly see statistically significant outliers.

Artificial intelligence: Through the GenAI-powered narrative summary, identify the key drivers behind a change through a factor lens and news events. Ask questions through our interactive chat and get instant results on what is contributing to your risk and return.

Leverage MSCI Content to Power Your Insights

As innovators in risk analytics, from the modern factor model to Value-at-Risk (VaR), we not only deliver impactful risk statistics to help measure, monitor, and manage risk, but provide:

- Broad market and reference data
- Extensive benchmark coverage
- Breadth of instrument coverage including privates, real assets, and infrastructure
- Granular pricing models across equity, fixed income, structured products, derivatives, and commodities

Putting It All Together



With cloud delivery, extensive content, and AI-powered insights, you could transform your risk management processes to not only drive efficiency, but also to drive a culture of risk management throughout the organization.

Contact us for more information

[msci.com/contact-us](https://www.msci.com/contact-us)

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.

Data*

- Sourced from nearly 80 vendors
- Reference data for 20M+ assets, including history
- 200+ staff dedicated to data services
- Significant QA processes

* Data as of May 2024

Quality of performance

- Maintain high data quality standards to deliver timely and reliable analytics
- Leading risk models and actionable insights
- An integrated view of risk and return running up to 1 trillion calculations per day

State of the art risk models

- Innovative VaR simulation methodologies
- Rigorous stress tests
- Market exposure and sensitivity analysis
- Equity, fixed income and multi-asset class factor models that include both public and private assets

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