





## ATTRIBUTES & CAPABILITIES

### Manager of Managers

This application allows investment professionals to compare and contrast the returns and risks of portfolio holdings relative to a benchmark or custom peer universe. Users can:

- Integrate then visually compare portfolio returns against benchmarks and peer universes.
- Create custom peer universe groups for a relative comparison of investment results.
- Provide a visual representation of information and insights which can be shared with consultants, executives, or clients.

### Portfolio Adjustment

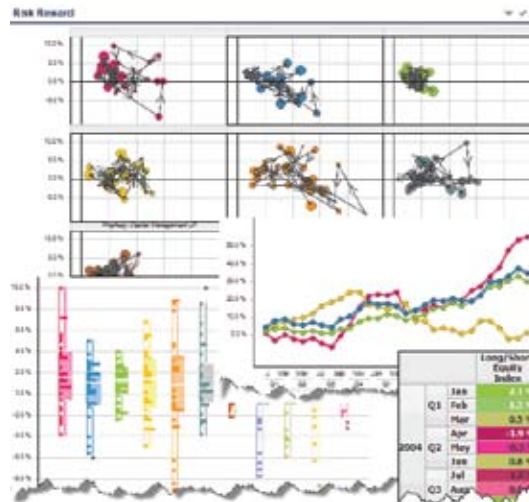
This application allows portfolio managers and analysts to accurately adjust their portfolio holdings by delivering up-to-date portfolio data to the TIBCO Spotfire enterprise analytics user interface. Users can:

- Examine portfolios at multiple levels and evaluate the results of holdings adjustments.
- Consider the output of proposed changes to the portfolio in meaningful increments then generate a buy-and-sell list for fast execution.
- Import updated portfolio holdings using information links and start the whole process over again without involving IT.

### Spotfire DDE Data Link

This tool enables any investment professional to drill down in market moving securities. By integrating portfolio holdings and near real-time market data into a single analytical environment, portfolio managers, traders and analysts can constantly and accurately take the pulse of the market as it relates to their portfolio:

- Systematically, identify and visualize market movers and their impact on portfolio performance.
- Using predefined bookmarks, drill down quickly into events and gain a deep understanding before committing capital or putting your reputation on the line.
- Quickly share insights and findings with other members of the investment process for more collaborative investment decisions.



*TIBCO Spotfire Asset Management Analytics Library has a visual and interactive environment that allows investment professionals quickly reveal hidden patterns, trends and biases in market data.*

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