MSCI

Barra Portfolio Manager

Helping build better portfolios

Barra
An MSCI Brand

Barra Portfolio Manager delivers the next generation of equity portfolio management tools and is designed to help fund managers and their teams build better portfolios, regardless of investment process. It allows users to gain additional portfolio insight, manage a more systematic investment process and make faster, more informed investment decisions - all on one integrated, flexible, risk and performance platform.

With an easy-to-use, interactive user interface, Barra Portfolio Manager offers a broad range of equity portfolio analytics, advanced workflow tools, and high quality data. It introduces Barra-defined workspaces and reports that can be tailored to the needs of each user, and reduces the total cost of ownership by integrating both risk and performance attribution onto one platform, centralizing data and leveraging the latest technology.

The layout and design of Barra Portfolio Manager helps users to quickly and easily analyze risk and return, monitor portfolios and conduct pre-trade 'what if' analysis across a number of scenarios before making edits to a portfolio's trade list or rebalancing a portfolio.

Key Benefits

Broad Choice of Analytics

Whether your investment process is quantitative, fundamental or a blend of both, choose from various attribution methodologies that help you identify the contributors to performance and reduce your exposure to unintended bets.

Enhance Insight and Control

View multiple reports, analytics, and time-periods side-by-side to quickly get a clear view into your portfolios. Powerful, advanced charting and 'Group-by' analysis capabilities help further unlock valuable insight so you can explain what drives your portfolio.

Reduce Time and Resources Spent on Data Management and Processing

All data and processing is managed on a secure, hosted platform, saving you time and helping to reduce costs. Organizations wishing to outsource all their data and system management operations can add the Barra Managed Services option for an additional fee.

Freedom to Customize, Define and Share Personalized Workspaces

Customizable workspaces allow users to personalize and combine multiple views on one screen. These workspaces can then be easily shared across the organization, including across multiple global locations, with access to content controlled by workgroup permissions.

Barra Portfolio Manager can be used throughout the investment process

Barra Portfolio Manager: Tailored to Your Needs

MSCI licenses Barra Portfolio Manager based on four levels of usage, the number of users, and models and data requested.

- ***Choose a level of platform usage that suits you*** – Four levels of access cover the basic software and data services, all of the equity portfolio analytics that go with the risk models, as well as high quality data, research, and 24 hour client service. The number of portfolios you manage, the amount of history you require and the frequency of your portfolio analysis will determine the right level of access for you.

- ***Name your users and the type of access they require*** – Barra Portfolio Manager provides the flexibility to group users into different private workgroups and types of usage, including *Portfolio Construction* users with access to the whole system, *Analysis* users with full analytical and workspace-creation control, and *Report* users with read-only and reporting access.

- ***Choose your markets*** – With a range of single country, regional and global equity models available on Barra Portfolio Manager, select the models you need to cover your investment universe and strategies. For the list of available equity models on Barra Portfolio Manager, please contact us.

- ***Identify the additional indices and benchmark data you need*** – A range of third-party data is available on Barra Portfolio Manager, including benchmark data from providers such as MSCI, FTSE, and S&P. Third-party licensing fees may apply.

- ***Add Additional Services*** – Complement your subscription to Barra Portfolio Manager with Barra Managed Services, which provides additional data and system management. Let MSCI's Client Operations Specialists watch over your nightly performance and data administration routines to help ensure your data and analytics are ready when you need them most.

To find out more about how Barra Portfolio Manager can be used within your equity investment process, please contact us.

Existing Barra Aegis Clients

Getting started is easy! Simply complete the Barra Order Form and an addendum to an existing Barra License Agreement to add the online service. **Contact us to get started now.**

Future releases of Barra Portfolio Manager will add further capabilities for developing, testing and managing investment products. Over time, MSCI plans to add additional portfolio construction capabilities for strategy development, back testing, optimized rebalancing, alpha investigation, and standard web-based interfaces (APIs).

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About MSCI

MSCI is a leading provider of investment decision support tools to investors globally, including asset managers, banks, hedge funds and pension funds. MSCI products and services include indices, portfolio risk and performance analytics, and governance tools.

The company's flagship product offerings are: the MSCI indices which include over 120,000 daily indices covering more than 70 countries; Barra portfolio risk and performance analytics covering global equity and fixed income markets; RiskMetrics market and credit risk analytics; ISS governance research and outsourced proxy voting and reporting services; FEA valuation models and risk management software for the energy and commodities markets; and CFRA forensic accounting risk research, legal/regulatory risk assessment, and due-diligence. MSCI is headquartered in New York, with research and commercial offices around the world.

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