

### The leading solution for investor prospecting and institutional data, seamlessly integrated into your own in-house system

Ipreo has built a reputation in the capital markets by building and managing the most complete, accurate, up-to-date profiles of money managers and analysts in the industry. With BD Advanced Embedded, the entire universe of institutional contact data and profiles is available to you directly within your own internal system - all the data you need right at your fingertips.

- z Ipreo's powerful platform, BD Advanced, is a highly flexible, global, multi-asset class platform with advanced analytical and screening capabilities
- z Customizable internal actions are fully incorporated into the BD Advanced tools and profiles for seamless integration with your workflow
- z Ability to synchronize the BD data sets with your internal system data and run detailed queries in real-time
- z Our convenient out-of-the-box implementation process does not require any additional hardware or software, saving your firm both time and money

#### Quick facts

- z BD Advanced is a robust workflow solution and buyside contact database relied on by over 8,000 capital markets professionals globally
- z Powerful search tools (including people, institution and quick searches) and access to over 115,000 institutional contacts and profiles at over 23,000 firms
- z Global standard for outstanding customer service and data quality
- z Most robust institutional database in the industry, covering equity, fixed-income, hedge funds and a complete range of investor types

**Janus Capital Management, LLC** Buy Side

Primary Contact(s): [Brett Johnson](#), [Kaelyn Abrell](#), [noAccount noAccount](#), [Paolo Gandolfi](#)

Location	Boston, United States		
Address	<a href="#">277 Park Ave., 12th Fl., New York, New York, 10172-3401, United States</a>		
Institution Type	Investment Manager-Mutual Fund	Telephone	<b>212-622-1480</b>
Website	<a href="#">www.janus.com</a>	Fax	212-622-1465
Primary Firm Focus	Industry Macro - Technology	Total Holdings (USD, mm)	789,123.23
Orientation	Active	Asset Allocation (USD, mm)	Equity: 622,00.13
Style	Contrarian, Value	Equity Port Turnover	39%
Strategy	Event Driven (Special Situations)	Activist	Yes

Manage Institution

- [Add to Institution List](#)
- [Export Institution](#)
- [Edit Institution](#)
- [Edit CDFs](#)
- [Delete from CRM](#)
- [Briefing Book Report](#)
- [Profile Report](#)

**Top 10 Holdings (USD, mm)**

Company	Value	Value Change	% Port
<a href="#">Potash Corp./Saskatchewan Inc.</a>	2,901.54	158.60 <span style="color: green;">↑</span>	2.90%
<a href="#">Apple, Inc.</a>	2,448.00	-100.00 <span style="color: red;">↓</span>	2.45%
<a href="#">Hess Corporation</a>	2,384.89	986.39 <span style="color: green;">↑</span>	2.38%
<a href="#">Research In Motion, LTD</a>	2,200.68	149.93 <span style="color: green;">↑</span>	2.20%
<a href="#">Google, Inc. CL A</a>	2,190.85	181.08 <span style="color: green;">↑</span>	2.19%
<a href="#">Celgene Corporation</a>	1,498.21	230.19 <span style="color: green;">↑</span>	1.50%
<a href="#">Syngenta AG</a>	1,469.68	7.70 <span style="color: green;">↑</span>	1.47%
<a href="#">Roche Holding, LTD</a>	1,4		
<a href="#">Bunge, LTD</a>	1.3		
<a href="#">The Procter &amp; Gamble Company</a>	1.2		

Technology	23.31%
Financials	12.76%
Consumer Services	12.25%
Healthcare	11.66%
Energy	10.11%
Industrials	9.97%
Consumer Goods	9.72%
Basic Materials	8.22%
Utilities	1.90%

Ownership

**William H. Bales (Will)** Buy Side

Job Function: **Portfolio Manager**

Institution Name: **Janus Capital Management, LLC** Investment Advisor-Mutual Fund

Address: 151 Detroit St., Denver, Colorado, 80206, United States

Mailing address: Same as physical address

Email: [will.bales@janus.com](mailto:will.bales@janus.com)

Telephone: **303-394-7321** Fax: 303-336-7445

BD Contact Details

	Contact Holdings	Institution Holdings
Current Position - Value/Change (USD, mm)	0 / 0	53.29 / 50.98
Current Position - Shares/Change	0 / 0	633,183 / 605,789
Industry Value - Value/Change (USD, mm)	148.74 / -7.28	2,222.43 / -66.56

Ipreo North America

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The screenshot displays the IPREO search interface with the following sections:

- Basic Search Options:** Includes filters for 'Search in' (BD Data, Company CRM), 'Filter by' (Equity, Fixed Income), 'Limit To' (My Contacts, CRM only), 'Search in Lists', 'Side' (Sell Side, Buy Side, Either), 'Show Criteria' (Institutions, Funds), and 'Name Search' (Last Name, Enter last name, Starts With, Contains).
- Advanced Search Options:**
  - Personal Information:** Search by job type and function, education, biography, personal details. Includes 'Coverage' filters (Equity, Fixed Income) and a 'Select Coverage' dropdown menu.
  - Institutional Information:** Search by institution type, focus, funds.
  - Investment Centers & Locations:** Filter by Locations...
  - Ownership Search Options:** Asset Class (Equity, Fixed Income), Company(s) (Single Company, Single Company, Multiple), Holder, and Theme filters.
- Results Table:** Displays 646 people. The table includes columns for Name, Institution Name, Primary Institution Type, Side, Asset Class, Value (FIS), USD, mm, Shares (FIS), Share Change Prior Quarter-End (FIS), % S/O, and a date. The first few rows list individuals like James Harmon, Lawrence Rakers, Scott Offen, Keith Quinton, and Matthew Fruhan, all associated with Fidelity Management & Research Company.
- Actions:** A dropdown menu for each row offering actions like Task, Fax, Phone Call, E-mail, Letter, Appointment, Service Activity, Campaign Response, Add a Note, Attach a File, Add Additional Address, Opportunity, Customer Relationship, and Open In Dynamics CRM.

## Our System

- z Our platform provides clean, intuitive search functionality coupled with the most complete, accurate and timely data in the industry
- z Institutional Contact Data and robust Ownership Information are fully integrated within the platform
- z Advanced investor screening & portfolio analytics, with detailed analytics on investor portfolios, provide a holistic view of the investors you are targeting
- z BD Advanced includes global, multi-asset class data
- z Access to BD Daily Hot News for the latest updates in institutional people movements and news
- z All of this is backed by 24-hour support by our renowned, experienced, client services team and account executives

**Our mission is to ensure our clients establish personal relationships with the right investors - effortlessly.**

## About Ipreo

The marriage of deep industry expertise and dynamic innovation, Ipreo brings market-leading intelligence, robust technology, and superior customer service to all participants in the global capital markets. Bringing together state-of-the-art new issuance & trading systems and premier global financial and investor data, Ipreo provides innovative technology and superior insights to all participants in the capital-raising process.