

The leading solution for investor prospecting and institutional data, seamlessly integrated into Microsoft Dynamics CRM

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. Now the entire universe of institutional contact data and profiles is available to you directly within Microsoft Dynamics CRM.

- z Ipreo’s powerful platform, BD Advanced, is a highly flexible, global, multi-asset class platform with advanced analytical and screening capabilities
- z Powerful search functionality provides access to over 115,000 institutional contacts and profiles at over 23,000 firms
- z Microsoft Dynamics actions are fully incorporated into the BD Advanced tools and profiles for seamless integration with your workflow

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 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

The screenshot displays the Microsoft Dynamics CRM interface with the 'BD for Dynamics' extension. The main window shows the 'Institution Search' results for 'Fidelity Management & Research Company'. Below this, there is a 'Top 10 Holdings' table and a pie chart showing asset allocation. A secondary window is open, showing the contact details for 'James M. Harmon (Jamie) Buy Side', including his job function as a Portfolio Manager and contact information.

| Company | Value | Value Change | % Port |
|-----------------------------|----------|--------------|--------|
| Google, Inc. CL A | 6,091.98 | 195.61 ↑ | 1.43% |
| Wells Fargo & Company | 6,051.69 | 875.40 ↑ | 1.42% |
| Apple, Inc. | 5,960.88 | 654.29 ↑ | 1.40% |
| J.P. Morgan Chase & Company | 5,443.73 | 244.57 ↑ | |
| Bank of America Corporation | 4,170.89 | 2,095.10 ↑ | |

| | |
|-------------------|--------|
| Technology | 22.39% |
| Financials | 16.55% |
| Consumer Services | 12.29% |
| Healthcare | 12.03% |
| Energy | 10.33% |

| | |
|-----------------|---|
| Job Function | Portfolio Manager |
| Account Name | Fidelity Management & Research Company Investment Manager-Mutual Fund |
| Address | 245 Summer St., 14th Fl., Boston, Massachusetts, 02210, United States |
| Mailing address | Same as physical address |
| Email | Harmon_research@fmr.com |
| Telephone | +1 617-563-0655 |
| Fax | +1 617-476-3672 |

| | | | |
|--------------|--------------------------------|----------------------------|--------------------|
| Account Type | Investment Manager-Mutual Fund | Strategy | |
| Style | Growth | Equity Portfolio Turnover | 46% |
| Orientation | Active | Total Holdings (USD, mm) | 677,800.00 |
| Activist | No | Asset Allocation (USD, mm) | Equity: 425,865.38 |

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 column. 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 'Select Action' is visible, listing tasks such as Task, Fax, Phone Call, E-mail, Letter, Appointment, Service Activity, Campaign Response, Add a Note, Attach a File, Add Additional Address, Opportunity, and Customer Relationship.

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.