

### The leading solution for investor prospecting and institutional data, seamlessly integrated into Salesforce

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 Salesforce.

- 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 Salesforce 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 IPREO BD Advanced interface within a Salesforce environment. The top navigation bar includes 'Setup', 'System Log', 'Help', and 'Logout'. The main header shows 'IPREO BD Advanced' and 'force.com apps BD Advanced'. The left sidebar contains search filters and a 'Recent Items' list. The central pane shows the 'Account Management & Research Company' details, including contact information, parent account, and annual revenue. A 'BD Advanced account profile' section is expanded, showing 'Fidelity Management & Research Company Buy Side' with location, address, and asset class information. An asset allocation pie chart is visible at the bottom left of this section. A contact profile for 'James M. Harmon (Jamie) Buy Side' is shown in a pop-up window, detailing his job function as 'Portfolio Manager', account name, address, email, and telephone number. The right sidebar contains 'Activity' and 'BD Contact Details' tabs.

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

- Basic Search Options:** Includes filters for Saved Searches, Search in (BD Data, Company CRM), Filter by (Equity, Fixed Income), Limit To (My Contacts, CRM only), Search in Lists (Contact Lists, Institution Lists), Side (Sell Side, Buy Side, Either), Show Criteria (Institutions, Funds), and Name Search (Last Name, Enter last name, Starts With, Contains, And).
- Advanced Search Options:**
  - Personal Information:** Search by job type and function, education, biography, personal information. Coverage: Equity (selected), Fixed Income. Select Coverage dropdown is open.
  - Institutional Information:** Search by institution type, focus, fundaments.
  - Investment Centers & Locations:** Filter by Locations.
  - Equity Ownership Search Options:** Company(s) (Single Company, Single Company, Multiple), Holder of Symbol, Theme (Holder, in the Industry, Select Macro Sector, Select Micro Industry).
- Results Table:** Displays 6806 people. Columns include Name, Institution Name, Primary Institution Type, Side, Asset Class, Value (Semicon... USD, mm), % Port (Semicon...), and % S/O (Semicon...). Rows include Robert Bertelson, Stephen DuFour, Victor Thay, and Steven Calhoun, all associated with Fidelity Management & Research Company.

### 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.