

## Overview

Ipreo’s highly trained Entity Management Team is responsible for the concordance of all entity lists, including those generated through Ipreo’s global proprietary research groups, as well as client or vendor files. As a service, our Entity Management group can process one-time mapping projects and ongoing daily maintenance of client lists to insure clients have the most up-to-date information available to them. Our entity maintenance covers all entities, from people to firms, mutual funds to securities and their issuers.

## External Services

Data quality is a nagging—and costly—concern when it comes to client account management systems. More often than not, the internal use-cases for company and contact databases means that there are significant data quality issues, from duplicate entries to inactive accounts indistinguishable from those that remain critical to the organization. Data cleansing is a time-consuming and extremely costly exercise that takes attention away from other critical areas.

Our Entity Management group is extremely skilled at solving data quality issues. In addition to having extensive experience mapping internal and 3rd-party entities and relational data points, Ipreo’s Entity Management Team has the combined experience of mapping tens of thousands of external client lists on behalf of Ipreo’s product offerings. Our Entity Management service offerings include:

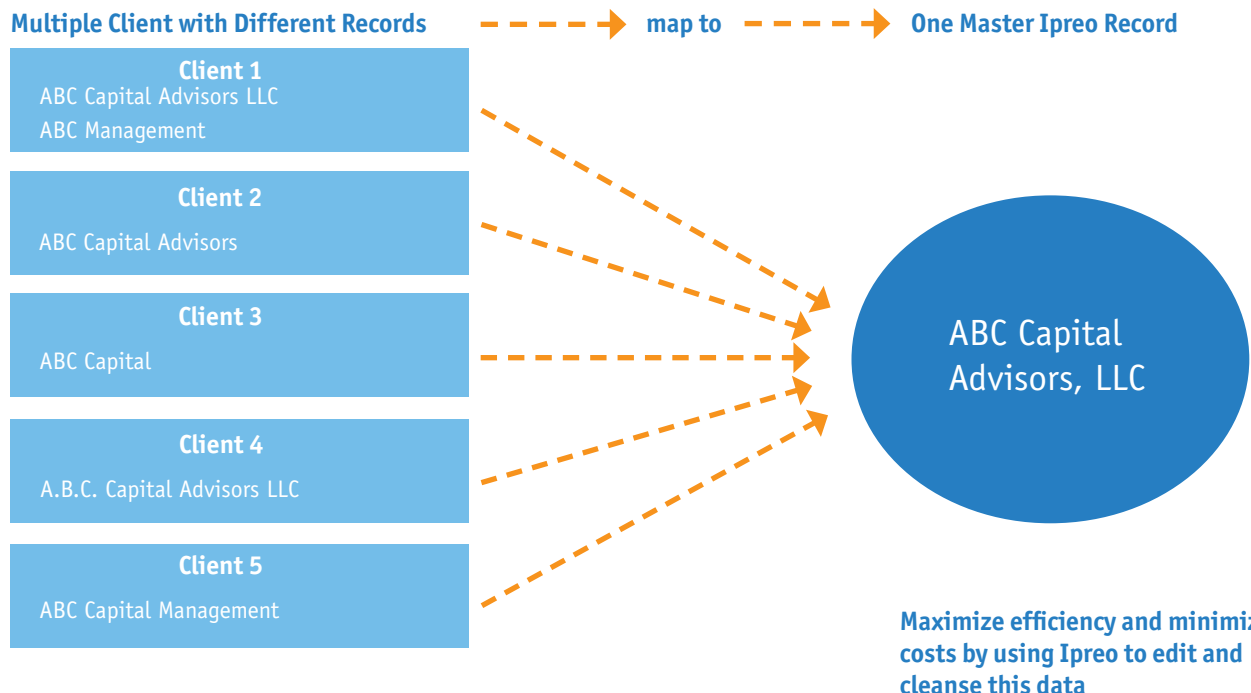
One-time data cleansing projects

- z Investor lists
- z Company data
- z People/Contact Management systems

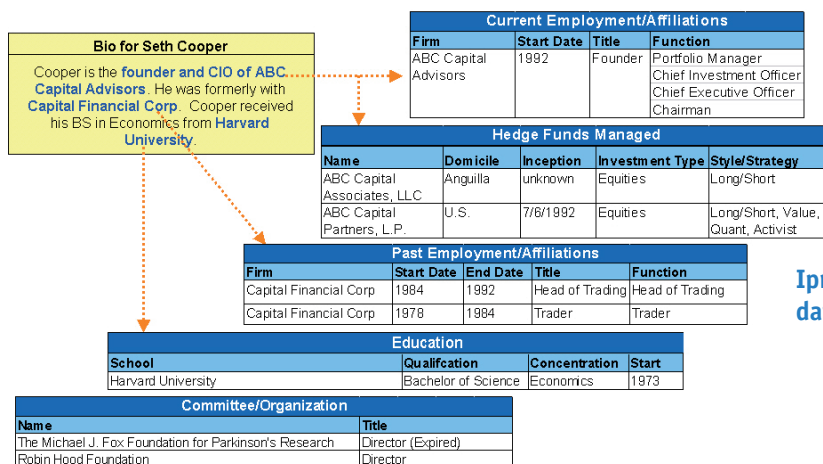
Ongoing data management services

- z Enabling mapped lists to be dynamically updated
- z Allowing Ipreo data points, from Bigdough content to our proprietary industry classifications and derived analytics, to be fed into client systems as part of a dynamic data feed
- z Leveraging Ipreo’s cutting-edge approaches to data quality and entity management, clients take advantage of time-series data, complex data relationships, such as contact employment history, as well as hierarchal data elements

## Lack of data causes significant data quality issues



Typical bios are static and cannot be cross-referenced....



Ipreo's approach unlocks the data's true power

### Best-of-Breed Content

One of the biggest advantages of Ipreo Entity Management comes from the proprietary lists we maintain within our own databases, covering companies (Buy-Side Firms, Sell-Side Firms, Issuers), products (Mutual Funds), and people (Buy-Side, Sell-Side). These Entity Lists enable us to map clients to the cleanest and most up-to-date entity lists available. Ipreo boasts superior data sets and related entity management lists.

**Data Quality** - Ipreo has a large, carefully trained and managed staff of capital markets research analysts. This massive force exclusively manages, updates and grows our database. No company in the industry comes anywhere close to dedicating the same level of manpower and resources to content management. As a consequence, the quality and accuracy of the intelligence we deliver to our customers is unparalleled. Simply put, we are known in the marketplace as the most highly accurate, timely and well-scrubbed provider.

**Expertise** - Ipreo has compiled a first-class team of language speakers with country specialties to track market movements, the legislative environment, and local press. Our global collection effort is based, with appropriate local market adaptations, on our time-proven research methodology, which is known to produce the best details available to the market.

**Global Brand** - Having offices worldwide, Ipreo's research team is part of a global effort involving hundreds of staff members in the US, Europe, Africa and Asia. Ipreo leverages these global resources to improve quality, accuracy, and breadth of content to an even greater degree.

**Superior Technology** - Ipreo is a leading international provider of execution software supporting Equity, Fixed Income, Municipals, Structured Products, Retail and Directed Share Programs. These applications require our team to maintain a comprehensive investor database which serves as the cross-reference point for tens of thousands of client accounts in support of these products as well as the iPlanner workflow solution.

### About Ipreo

Ipreo is a leading global provider of high quality data, expert insight, and productivity solutions to Investment Banking and Corporate clients. With decades of experience serving the capital markets, a reputation for superior customer service, and a commitment to creating technologies that improve our clients' performance, Ipreo is both a dynamic innovator and a trusted resource. Counting the world's leading investment banks, and hundreds of Fortune 1000 & FTSE 100 corporations as customers, Ipreo demonstrates every day how it brings players together through market-leading innovation, intelligence, and insight.