

BD Corporate - the most comprehensive Investor Relations workflow solution on the market

The Solution

BD Corporate offers IR professionals a complete IR workflow solution backed by the most comprehensive and up-to-date global investment community database.

- z Global, multi-asset class institutional contact and ownership data
- z Complete contact management capabilities including activity reporting and performance benchmarking
- z Clean, fast, intuitive search functionality and fully integrated CRM
- z Advanced analytical and investor screening tools
- z Full integration with Ipreo's Global Market Intelligence and Analytics offerings

Quick facts

- z Global standard for outstanding customer service and data quality
- z Comprehensive profiles of institutional money managers and their portfolio holdings
- z Most robust hedge fund and fixed income database in the industry
- z SCOUTING REPORT® - Provides unique insight into fund managers' decision-making criteria, and gives detailed information about your investors and marketplace
- z Ahead of the curve on key investor types: Sovereign Wealth Funds, Socially Responsible Investors, Activists and Sustainability
- z Leveraged by countless IR professionals around the world

Janus Capital Management, LLC Buy Side

Primary Contact(s): [Adam Jonas](#), [Anne Smith](#), [Murray Stahl](#)

Activity Quick Profile

Location: **Denver, United States**

Address: 151 Detroit St., Denver, Colorado, 80206-4805, United States

Website: <http://www.janus.com>

Asset Class: **Equity, Fixed Income**

Phone: +1 303-333-3863

Fax: +1 303-333-4955

Fix Data

- Add to Institution List
- Remove from Lists
- Briefing Book Report
- Create Profile Report
- Edit Institution
- Delete from CRM
- Disable BD Auto Update
- Merge Institution

Institution Type: **Investment Advisor-Mutual Fund**

Style: **Aggressive Growth**

Dominant Orientation: **Active**

Portfolio Turnover: **47%**

FI Portfolio Turnover: **30%**

Reported Total Holdings (USD, mm) 9/27/2010: **92,648.39**

Stated Total Holdings (USD, mm): **92,648.39**

Reported Equity Assets (USD, mm) 9/27/2010: **71,988.22**

Reported Fixed Income Assets (USD, mm) 7/31/2010: **17,946.29**

Reported Cash (USD, mm): **2,309.47**

Reported Other (USD, mm): **404.41**

Fixed Income Portfolio Holdings

- Corporate 62.59%
- Government 29.43%
- Fixed Income - Other 6.12%
- MBS 1.06%
- Municipal Bonds 0.58%
- ABS 0.00%

Asset Allocation

- Equity 77.70%
- Fixed Income 19.37%
- Cash 2.49%
- Other 0.44%

Technology 25.77%

Financials 15.66%

Healthcare 13.48%

Consumer Services 13.17%

Industrials 10.77%

Consumer Goods 9.41%

Energy 7.68%

Values (USD, mm) Public Filings Surveillance

Current Position in GOOG - Value/Change: **1,093.19 / 32.06**

Current Position in GOOG - Shares/Change: **2,456,878 / 72,043**

% of Portfolio: **1.48**

% of Shares Outstanding: **0.99**

GOOG Rank in Portfolio: **11 out of 782**

Institution Holdings

Holder Rank

Industry Value/Change

Peer Value/Change

Ownership Summary

# of Holdings	
Portfolio Value (USD, mm)	71,988
New Positions (USD, mm)	1,933
Increased Positions (USD, mm)	6,048.8
Decreased Positions (USD, mm)	-10,280.8
Unchanged Positions (USD, mm)	71,988

William H. Bales (Will) Buy Side

Job Function: **Portfolio Manager, Analyst**

Institution Name: **Janus Capital Management, LLC**

Address: 151 Detroit St., Denver, Colorado, 80206-4805, United States

Mailling address: Same as physical address

Email: will.bales@janus.com

Telephone: **+1 303-394-7321**

Photo:

Fix Data

- Designate Primary
- Add to Contact List
- Add to Institution List
- Add to My Contacts
- Export Vcard
- Edit Contact
- Delete from CRM
- Exclude From Mail
- Disable BD Auto Update
- Merge Contact
- Briefing Book Report
- Create Profile Report
- Sync with Outlook

BD Contact Details Overview

Manage Contact

Education: University of Colorado

Biography: Bales joined Janus Capital Management in 1991 and became a research analyst in 1993, focusing on technology, media, retail, and consumer products. He received a BA in Marketing and an MS in Marketing and Finance from the University of Colorado.

Janus Capital manages the Janus family of mutual funds, as well as institutional portfolios. The firm has separate aggressive, diversified, small/mid/large-cap, balanced, global (U.S./non U.S.), non-U.S., mid- and large-cap growth, and value portfolios. The firm was founded in 1969. Janus also manages the Janus Adviser (offered through financial planners) and Janus Aspen (institutional class/401k) families of funds. Stillwell Financial Inc. merged its operations into a single organization that markets its products under the Janus name. As a part of this merger with Stillwell Financial, the firm manages strategic direction of Berger Funds, London-based Nelson Money Managers, and DST Systems. Janus also has a 80% stake in INTECH and a 30% stake in Perkins Wolf McDonnell & Company. The firm was formerly a subsidiary of Kansas City Southern, a Midwestern conglomerate, which spun off its financial services firms from its rail transport business to form Stillwell Financial.

For all of its portfolios, Janus uses proprietary fundamental research and builds a detailed financial model for each stock under consideration that looks at: (a) business plans; (b) products/services currently offered or in development; and, (c) pricing. The firm's bottom up research effort includes analysis of competitors and suppliers, demographic trends, on-site visits, media coverage, and other qualitative factors. Janus also emphasizes frequent visits with corporate management, employees, and customers. The firm conducts private placements as well.

Ipreo North America

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The screenshot displays the IPREO search interface with various filters and a table of results. The filters include Search in (BD Data, Company CRM), Filter by (Equity, Fixed Income), Limit To (CRM only), Side (Sell Side, Buy Side, All), Show Criteria (Institutions, Funds, Institutions & Funds), Coverage (Equity, Fixed Income), Market Cap, Industry Macro, Industry Mid, Industry Micro, Style, Position Status, Industry, Market Cap, Issuer Listing Region, Issuer Listing Country, Exchange, Security type, Issuer Country of Origin, Issuer Region of Origin, and Select Mid Industry. The table shows 137 people with columns for Name, BD Institution Name, Primary Institution Type, Side, Asset Class, Job Function, Phone, Coverage, Market Cap (EQ), and Coverage.

Name	BD Institution Name	Primary Institution Type	Side	Asset Class	Job Function	Phone	Coverage	Market Cap (EQ)	Coverage
Heike Gregorzewski	Allianz Global Investors Kapitalanlagegesellschaft mbH	Investment Advisor-Mutual Fund	Buy Side	Equity	Portfolio Manager	+49 69-263-140	Large Cap	Aggres	
Todd Hawthorne	RCM Capital Management, LLC (U.S.)	Investment Advisor-Mutual Fund	Buy Side	Equity	Portfolio Manager	+1 415-954-5400	Large Cap	Aggres	
James Stone	BAMCO, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2098	Large Cap	Aggres	
Catherine Chen	BAMCO, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2084	Large Cap	Aggres	
Kyubey August	BAMCO, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2084	Large Cap	Aggres	
Siming Yang	BAMCO, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2086	Large Cap	Aggres	
Gilad Shany	BAMCO, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2000	Large Cap	Aggres	
David Kirshenbaum	BAMCO, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2000	Large Cap	Aggres	
Steven Thumm	Fred Alger Management, Inc.	Investment Advisor-Mutual Fund	Buy Side	Equity	Analyst	+1 212-583-2000	Large Cap	Aggres	

Our System

- z BD Corporate includes global, multi-asset class data, as well as advanced investor screening
- z Our platform provides clean, intuitive search functionality coupled with the most complete, accurate and timely data in the industry
- z Institutional Contact Data, robust Ownership Information and Ipreo's proprietary Market Intelligence & Analytics are fully integrated within the platform
- z Advanced investor screening & portfolio analytics provide a holistic view of the investors you are targeting
- z Ipreo tracks changes to targeted industry contacts or ownership and makes thousands of updates daily while providing users with proactive alerts
- z Flexible reporting facilitates communication of the results of your efforts to Senior Management and the Board
- z The most complete global cross-asset class ownership data allowing combined views of an issuer's total capital structure including Fixed Income and Equity ownership
- z Seamless access to real-time pricing information, news, research, key corporate actions and dividend data via BD Corporate
- z All of this is backed by 24-hour support by our renowned and experienced account management team

- z Enhanced Calendar functionality provides the ability to see all activities on your calendar in a daily, weekly, or monthly view as well as a brand new List View
- z Improved Organizer functionality enables you to better track sponsored meetings and report on the effectiveness of sponsored deal and non-deal roadshows

The screenshot shows the IPREO calendar and organizer functionality. It displays a calendar view for October 25, 2010 (Monday). The calendar shows two activities: 'Alert test 1 - Alerting Users 2' and 'Alert test 2 - Alerting Users 2'. The 'Alert test 2' activity is expanded to show details, including the activity name, note, and participants. The participants are divided into External Participants (3) and Internal Participants (0). The External Participants are Edward Corallo, Diane Haring, and Jeff Eisen, all from BlackRock Fund Advisors (formerly Randevus Global). The Alert Recipients for the 'Alert test 2' activity are Sunday Adoyemi, Pamela Berson, Seria Deyl, and Kelly McParland.