

Critical analysis to maximize investor outreach

Our Service

Investor targeting, at some level, is a component of every Investor Relations program. However, the true value of Ipreo's targeting service comes from the depth of the analysis, the quality of the contacts you receive, and the level of analyst support you have access to. Led by the people who revolutionized the targeting industry, Ipreo leverages unparalleled knowledge of the buy-side and sell-side communities to provide clients with continuous evaluation and analysis of the investing landscape. The benefits of meeting with new investors include diversifying and expanding your shareholder base, adding long-term, loyal holders and building interest in your stock to counterbalance selling. Ipreo is skilled at identifying investors whose investment style and criteria for investing are compatible with your company's fundamentals. By offering the most innovative quantitative and qualitative analysis in the industry, our experienced analysts help companies implement effective and efficient investor outreach

Quick facts

- z Fundamental valuation analysis of a company's position amongst peers and the market
- z Advanced investor targeting for proactive investor outreach
- z In-depth ownership composition & analysis
- z Profiles on investor targets providing detailed insight
- z Predictive modeling of likely future institutional activity
- z Insight into likely behavior and fit of existing shareholders

Boston Targets

Targets

Sorted by Target Rank (Ascending)

Institution	Rank	Eq. Assets (\$mm)	Portfolio Sensitivities			Purchasing Power	Rank in Portfolio	XYZ		Industry Peers		Fundamental Peers		Contact Name
			P/E	Div Yld	EPS Growth			Value (\$mm)	Val Chg (\$mm)	Value (\$mm)	Val Chg (\$mm)	Value (\$mm)	Val Chg (\$mm)	
1 Fidelity	1	698,791.4	3	4	2	38,024,326	163/5349	1,228.4	372.2	13,491.1	-800.7	35,811.8	932.9	Andrew Oh
2 Putnam	1	85,873.5	2	4	3	19,501,068	213/3551	92.4	0.0	2,757.7	-117.9	5,610.5	-151.4	Brian DeChristopher
3 Pyramis	1	55,043.0	3	4	3	15,718,987	127/2052	78.3	0.0	1,015.4	-55.8	2,191.3	11.4	Stephen Balter
4 RiverSource	1	60,055.7	3	4	3	15,272,896	101/3757	135.0	0.0	2,496.3	44.4	4,884.2	-164.5	Nicholas Thakore
5 Pioneer	1	32,819.4	3	3	3	1,563,922	57/897	141.3	0.0	1,254.9	-4.0	2,618.1	-284.5	John Carey
6 Loomis, Sayles	2	17,796.0	4	5	1	2,253,122	430/687	4.6	0.0	429.8	-90.5	1,173.1	-6.6	Warren Koontza, Jr.
Total:						92,334,321		1,680.0	372.2	21,445.1	-1,024.5	52,288.9	337.2	

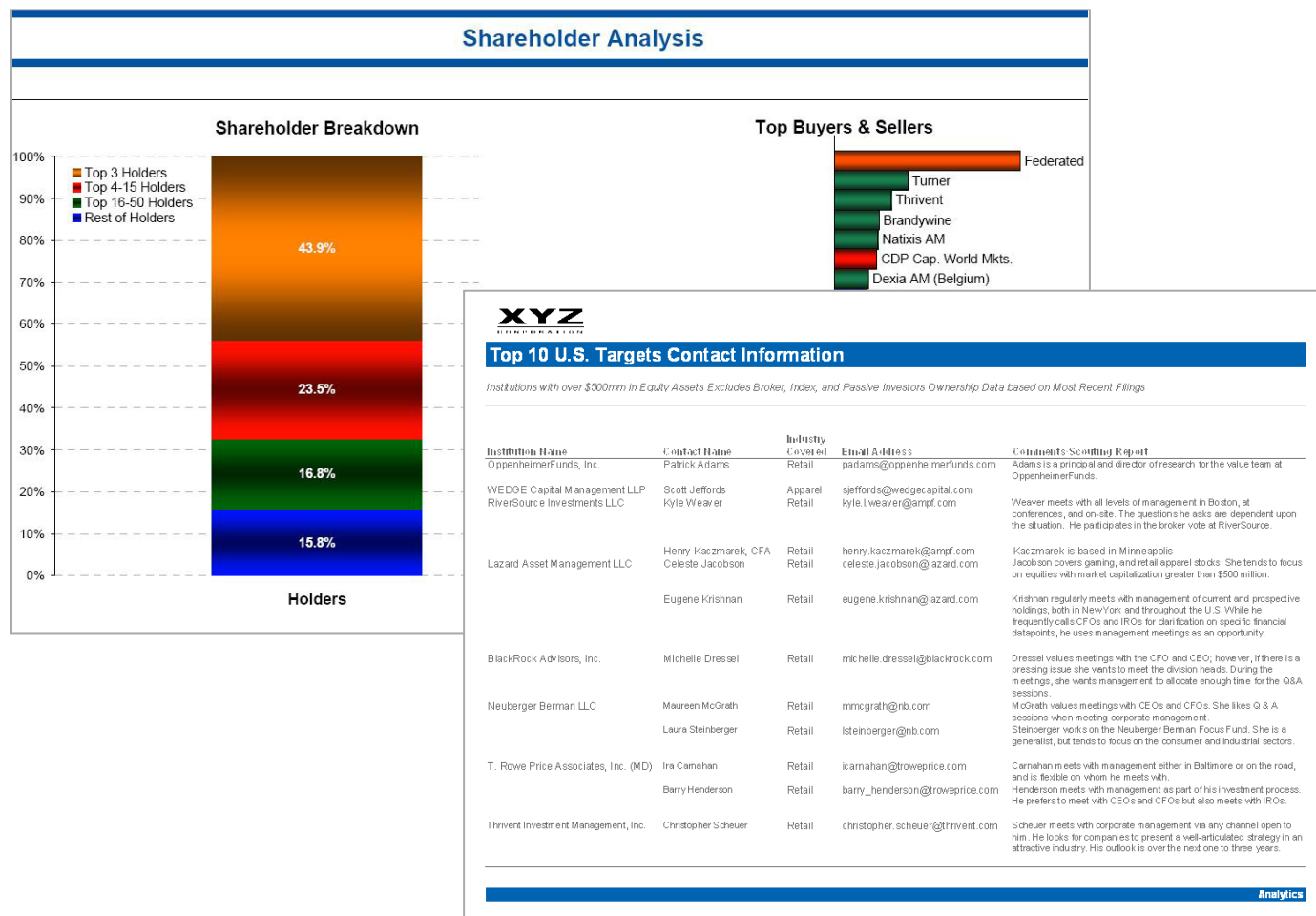
Recently Met Holders

Sorted by Target Rank (Ascending)

Institution	Rank	Eq. Assets (\$mm)	Portfolio Sensitivities			Purchasing Power	Rank in Portfolio	XYZ		Industry Peers		Fundamental Peers		Contact Name
			P/E	Div Yld	EPS Growth			Value (\$mm)	Val Chg (\$mm)	Value (\$mm)	Val Chg (\$mm)	Value (\$mm)	Val Chg (\$mm)	
1 Wellington	1	326,176.2	3	4	3	9,694,147	11/3450	2,698.8	-178.6	14,764.5	8.8	19,377.2	746.0	Edward Owens
2 BlackRock	1	162,596.0	3	4	3	8,643,307	32/6135	654.3	16.3	6,790.1	741.5	11,155.6	-87.2	Erin Xie
3 MFS	1	107,280.3	3	3	3	7,744,366	81/1481	327.0	-9.0	3,566.4	-470.2	9,138.4	-660.9	Stephen Pesek
4 Evergreen	1	30,476.3	3	3	3	2,330,461	56/2224	86.2	0.0	1,155.5	21.1	2,013.1	-1.3	Robert Junkin
5 Eaton Vance	2	55,711.6	2	3	4	3,778,880	24/1010	569.8	109.6	2,631.3	271.0	5,985.9	331.3	Erick Lucera
6 Boston Company	2	19,726.6	2	4	4	1,677,407	75/1863	47.1	0.0	315.7	-20.8	427.9	32.0	Charles Silberstein
7 FM Global	2	4,217.0	2	4	3	905,650	79/140	17.9	2.4	193.8	-10.9	558.8	8.8	Clinton Condon
Total:						34,774,218		4,401.2	-59.4	29,417.3	540.4	48,656.9	368.7	

Investor Targeting - A Quantitative and Qualitative Approach

- z The highest quality contacts combined with actionable intelligence
- z In-depth screening processes focusing on business segments, market capitalization, investing fundamentals and macroeconomic data
- z Innovative peer groups, creating the most complete view of the client, including unique situations
- z Comprehensive buying and selling analysis, identifying historical ownership trends
- z The most advanced targeting algorithms, evaluating investments on a fundamental basis to determine optimal investors
- z Analysis beyond targeting; providing intelligence to identify overweight investors and likely sellers
- z Collaboration with senior management throughout the targeting process



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. Built on a legacy of experience and a thorough understanding of capital markets, Ipreo provides critical insights and flexible solutions to help our clients run better investor relations programs.