

PrimePortal

Solutions for Advisors

Customized Web-based
Solutions for
Wealth Management
Organizations



Market data solutions tailored to help meet the needs of your wealth management business

PrimePortal for AdvisorsSM can enable firms to create a customized and easy-to-use solution to help increase efficiency and effectiveness. These intuitive solutions are designed to do more than merely display data; they can provide comprehensive searching capabilities and present the financial information in context, via an attractive format. These tools are also designed to help advisors access and compare key market and client data quickly and easily for in-depth analysis.

Key capabilities

■ Content

Includes global market data, news and research along with a firm's proprietary and third-party content, sales and marketing information, as well as data from customer relationship management and portfolio management systems. These are just a few examples of the types of content that the platform can integrate.

■ Functionality

Designed to enable firms to leverage an array of pre-built display windows and provides a gateway to a robust API for seamless data access and integration.

■ Workflow Process

PrimePortal for Advisors can be customized to help support and standardize the workflow processes of your firm, reducing advisors' administrative tasks.

■ Business Rules

Firms can leverage built-in logic to select criteria for creating model portfolios, rebalancing portfolios, benchmarking and evaluating performance.

■ Data "visualization"

Interactive Data can provide access to large quantities of data that can be presented in an intuitive and attractive way, making the content manageable by putting it into context.

Core components

■ Contributed Data

The Contribution Suite is designed to enable seamless integration of your internal information (including news, research reports and commentary), recommended lists, and available inventory. Firm-specific content can be combined with certain market data (as available), and detailed securities information, to create a holistic view for your advisors.



Advisor Dashboard

■ Portfolio Management

The Portfolio module is designed to offer a wide range of capabilities, from a simple watch list to a professional portfolio analysis tool. These capabilities help to support the customer advisory process and investment decision-making.

■ Extensive Alerting

Your financial advisors and customers can be automatically informed about relevant events based on their pre-defined criteria via SMS, e-mail or online notifications.

The features you demand

- State-of-the-art tools for analyzing charts, screening financial instruments, and tracking portfolios
- Individual permissioning, entitlement, and reporting tools that can help control costs



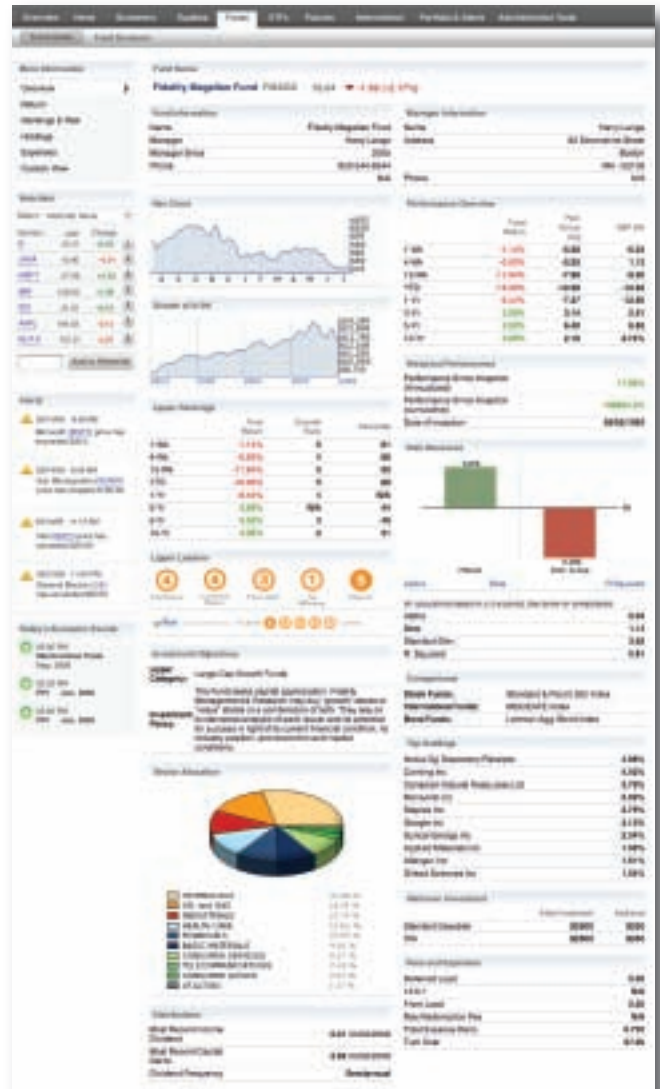
Portfolio Tracker

Help build client relations with effective service

- A native reporting engine can simplify the creation of client proposals and streamline time-consuming reporting responsibilities
- Information from CRM systems can be seamlessly integrated
- Firms can add on a customer-facing portal to facilitate collaboration and information sharing

Features and content coverage includes:

- Interactive charts
- Watch lists
- Gainers and losers
- Most actives
- Dashboards
- Stock screener
- Calculators
- Mutual fund screener and profiles
- ETF screener
- ETF comparison tool
- Portfolio tracker
- Portfolio performance charting
- Portfolio breakdown
- Advanced price and news alerts



Fund Profile

- Global market data
- Asset class coverage: equities, options, futures, mutual funds and money markets
- Exchange-traded funds
- Indices
- Forex rates
- Company and business news
- Research and analysis data

Interactive Data Corporation

Interactive Data Corporation (NYSE:IDC) is a leading global provider of financial market data, analytics and related solutions to financial institutions, active traders and individual investors. The company's businesses supply real-time market data, time-sensitive pricing, evaluations and reference data for millions of securities traded around the world, including hard-to-value instruments. Interactive Data, headquartered in Bedford, Mass., has approximately 2,400 employees in offices located throughout North America, Europe, Asia and Australia.

Interactive Data's Managed Solutions business is a leading provider and operator of customized financial information systems. The group builds and manages Web-based financial market data portals and terminals for a range of organizations worldwide, from retail and investment banks to asset managers, online brokers, stock exchanges and media portals. By aggregating a broad set of financial data and client-proprietary content and offering visually stunning features such as charts, sophisticated search functions, decision-support tools and analytics, these intuitive applications can help customers optimize their business processes and realize efficiencies. This group is managed as part of the Interactive Data's Real-Time Services business, which provides a comprehensive suite of offerings that includes PlusFeedSM a consolidated, low-latency digital datafeed.

For more information about Interactive Data Corporation and its businesses, please visit www.interactivedata.com.

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