



Comprehensive, not complicated

Simplify the process of managing information, monitoring results and generating reports for complex investment programs.

Investment Metrics provides the solution.

Discover the correlation between less effort and more efficiency

- Create customized deliverables based on your specifications
- Tap into the breadth of functionality and depth of features all within one solution
- Streamline your effort with an assortment of processing options
- Efficiently generate a variety of reports as and when you need them
- Reduce the time it takes to produce all of your reports all at once

Transform your workflow, maximize your results

- Capture information from multiple sources with data integration
- Calculate and store performance with performance measurement and analysis
- Determine the drivers of performance with portfolio attribution
- Track investment policy compliance
- Archive essential investment details within one system

Differentiate alpha with better business intelligence

- Search for new opportunities with a built-in global database of unique attributes
- Compare a large number of portfolios, investments, benchmarks or peer groups
- Evaluate your own custom data sets, benchmarks or peer groups
- Improve information management across your entire organization
- Access Investment Metrics' expertise and world-class customer service



Based in Darien, CT, Investment Metrics (www.invmetrics.com) is an independent provider of investment performance analytics, manager research and reporting solutions for institutional investors and advisors. Built by institutional investment consultants for investment professionals, our solutions include PARis (performance analytics and reporting), InvestWorks (manager search and due diligence), EQuest (manager data portal), peer universe data and outsourced reporting services. Our clients include 24 investment consulting and advisory firms, advising to more than 40,000 portfolios with approximately US\$5 trillion in assets

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Solutions

PARis [Performance Analysis & Reporting Information System]

A fully-integrated, turn-key investment analytics platform that delivers performance measurement and risk attribution with streamlined, customized, presentation-quality reporting tools in one system.

Performance Measurement & Attribution

PARis provides a data repository for all of your portfolio information with a built-in calculation engine to generate in-depth analytics, using performance measurement and attribution tools all in the same platform.

- Integrate performance data and holdings from multiple sources
- Generate investment performance from transaction level data
- Chose the return series you wish to use
- Aggregate performance and holdings analysis for reporting

PRISM

PRISM is a password protected web-based portal linked to your web site designed to efficiently deliver any documents you want to share with your plan participants.

- Connects perfectly with PARis reporting
- Instant access to an on-line portal of reports
- Streamlines the delivery process

Investment Reporting

Investment reporting doesn't need to be complicated to provide comprehensive results. Get a 360° view of all financial reporting with a top-level summary and the supporting details of all current or proposed plan investments, designed the way that's best suited for you.

- Generate reports by investment, asset class and total plan
- Incorporate commentaries
- Create customized exhibits and complete reports
- Streamline the monitoring process
- Track changes to plan structures over time
- Archive all portfolio-related details, changes and deliverables for compliance purposes

InvestWorks.com

Global Manager Search & Comparison Database

InvestWorks is an Internet-based, manager research system that provides a global database of information on investment firms, products and style universes with built in search and reporting tools.

- Search by the attributes you deem appropriate
- Compare data for benchmarking and reporting purposes
- Easy to use and scalable across your organization
- Access available 24/7



Outsourcing

Outsourced Reporting and Custom Data Services

Sometimes it is easier and more cost effective for a trusted third-party to run the administrative tasks of data collection and investment analysis.

- Leaves you more time to focus on other important fiduciary duties
- Cost effective option