

## Our Services for Asset Managers

### Providing Sustainable Edge to Asset Managers

We are a leading provider of offshore research and analytics services to global asset managers. We support end-to-end services to asset managers across verticals, starting from equity research, fixed income research, quantitative research, portfolio analytics, data management, to fund marketing services and compliance.

Moody's Analytics Knowledge Services team, with its strong research pedigree, offers specialist outsource support to asset managers, which helps improve investment performance, enhance client servicing and attract new client assets, and retain assets in the existing complex business environment.

#### Equity Research

- » Idea Generation and Validation
- » Coverage Initiation and Maintenance
- » Thematic Research
- » Company and Sector Reports
- » News Alerts and Monitoring
- » Monitoring and Synthesizing
- » Broker Research
- » Forensic Analysis



#### Fixed Income and Credit Research

- » Investment Grade
- » High Yield and Leveraged Finance
- » Distressed Debt
- » US Municipals
- » Sovereign Debt
- » Structured Finance
- » Emerging Markets
- » Convertibles



#### Portfolio Research and Operations

- » Performance Measurement and Attribution
- » Risk Analytics
- » Fund Accounting and Operations
- » Investment Reporting
- » Portfolio Construction, Optimization, and Asset Allocation
- » Manager Research
- » Data and ESG Analytics
- » Statistical Modeling
- » Econometrics
- » Transaction and Reference Data Management



#### Fund Marketing Services

- » RFP/RFI and DDQ's
- » Consultant Database uploads
- » Factsheets
- » Pitchbooks, Presentations and Marketing Materials
- » Competitor Analysis
- » Natural Language Generation for Investment Commentaries
- » Client Reporting
- » ETF Support
- » Digital Marketing



#### Compliance Services

- » Investment Compliance Support
- » Guideline Coding and Monitoring
- » Pre and Post Trade Monitoring
- » Central Compliance Support
- » Marketing Literature Review Support
- » KYC and Client On-boarding Support



#### Index/ETF and Data Management Services

- » Index Operations
- » Index/ETF Strategy Research and Analytics
- » Unstructured and Structured Data Sourcing
- » Data Integration
- » Data Research and Analytics
- » Data Visualization with Interactive Dashboards



#### Data Management and Technology Services

- » Data Sourcing And Management
- » Alternate Data Sourcing (Structured and Unstructured)
- » Data Migration, Integration and Reporting services
- » Data Governance Support
- » Business Analytics
- » Customized Visualization and Interactive Dashboards
- » Web Scraping Tools and Data Platform APIs
- » Customized Tool development



## Equity Research

Our equity research team provides services in four broad categories: Idea generation and validation, coverage initiation and maintenance, alerts and monitoring, and specialized research. Asset managers use our research and analytical support as a source of leverage and performance enhancement. Portfolio managers and analysts of firms that use our services find more time to spend on meeting management, generating ideas and conducting deeper analysis, thereby expanding the flow of quality ideas and depth of coverage and accelerating the pace of converting broad themes into actionable ideas.

## Fixed Income and Credit Research

We are a one-stop shop that provides credit research services across rating categories - Investment grade, high yield, distressed debt, crossovers, and rating products - leveraged loans, money markets, sovereigns, structured finance, munis, and convertibles. The credit team works on a wide breadth of activities, ranging from data collection, spreading, modeling to final-form research publication. Owing to this experience, our credit research team helps asset managers find the right opportunities.

## Portfolio Research and Operations

Moody's Analytics Knowledge Services provides performance attribution and portfolio analytics support to various institutional asset managers across a range of asset classes. Our team has experience in several off-the-shelf applications, including FactSet, Barra Aegis, Axioma, Wilshire Axiom, Bloomberg, and POINT. Further, our seasoned team of mathematicians and programmers develop custom portfolio analyzers, attribution tools, optimizers, risk monitors, and risk management tools to meet bespoke requirements of sophisticated clients.

## Fund Marketing Services

Moody's Analytics Knowledge Services has worked across a wide spectrum of fund marketing support activities for asset managers, streamlining and optimizing their existing processes used for RFP

responses and factsheet generation by creating fund marketing material and providing after-sales support, freeing up asset managers' time to focus on assets under management (AuM) growth and facilitating better reach and communication with prospective investors and fund consultants.

## Compliance Support

We enable investment managers to rigorously implement their compliance policies and controls at a lower cost.

As regulatory pressures increase, compliance departments of asset management firms leverage our services to enhance their ability to do more for less. We work as an extension of our clients' internal compliance teams, providing additional bandwidth and flexibility to achieve organizational objectives.

## Index and ETF Services

We provide Index services to investment managers and investment banks. Our services range from creation, maintenance and reporting across client Index mandates for pure beta replication, to bespoke indices. Our Index team offers both lifecycle and task-based support at various points of a client's Index operations. By leveraging our broad suite of Index services and solutions, our clients are able to move up the value chain, which helps them overcome budgetary and research bandwidth constraints.

## Data Management and Technology Services

We combine capital market expertise with data and technology solutions to provide innovative data management and analytics solutions to our clients. Our services help asset managers unlock the true potential of the underlying data by enterprise database overhauls, data collection methodology improvements, and governance processes enhancements using best-in-class, ready-to-deploy and customized technology solutions. With our extensive experience in sourcing and managing different data types and developing analytical solutions and customized visualization dashboards, we provide the right partnership for managing extensive amount of data and extracting insights.

### ABOUT MOODY'S ANALYTICS KNOWLEDGE SERVICES

Moody's Analytics Knowledge Services, a division of Moody's Analytics, is a leading provider of high-value research, analytics and business intelligence to the financial services sector. The company supports over 250 financial institutions and consulting companies through a team of over 2,500 subject matter experts who work as an extension of the clients' teams based out of various global delivery centres.

We empower our clients to drive revenues higher. We innovate using our proprietary technology and automation solutions. We enable our clients to transform their operating model and cost base.

© 2019 Moody's Corporation, Moody's Investors Service, Inc., Moody's Analytics, Inc. and/or their licensors and affiliates (collectively, "MOODY'S"). All rights reserved.