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FINANCIAL EXPRESS RELEASES “ANALYTICS v2.2” - INNOVATION IN FUND RESEARCH AND ANALYSIS

Financial Express, leaders in fund selection, has launched Analytics v2.2, the most innovative fund research and analysis package for financial intermediaries, brokers and institutional analysts.

The latest release of Analytics offers clients an even more comprehensive, web-based service to analyse funds and equities. Brand new features of the product include the addition of two new data universes, **ABI Insurance Funds** and **ABI Pension Funds**. These are based on ABI sector membership and conform to the rules imposed by the ABI.

Total Expense Ratios (TERs) for the unit trust and OEIC universe have also been added; Financial Express is now the official collector and provider of TER data for the IMA.

Analytics is the first fund research product to include **Stochastic Modelling**. Clients can choose the percentage mix of up to 5 asset classes and a quinquennial time period up to 25 years. The probabilistic outcomes are then presented as a fan chart. Stochastic projections can be performed at fund and/or portfolio level, and can be saved, retrieved, printed, turned into PDFs or exported into other applications.

Value at Risk (VAR) has been added to the custom report feature where clients can choose the confidence level (90%, 95%, and 99%) as well as the period at risk (daily, weekly or monthly).

An upgraded **Portfolio Scanner**, or x-ray tool, is now available offering:

- top ten weighted holdings across a portfolio
- latest performance and ratios
- latest asset allocations
- stochastic projection of the portfolio's likely performance over 20 years has been added, with median, 50th and 80th percentile probabilistic outcomes displayed on a chart.

Analytics clients can create **Composite Benchmarks**, using funds, sectors, indices, asset classes, portfolios or any combination of these instruments.

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Clients can use the **Adviser Fund Index** range of indices (AFI Aggressive, AFI Balanced, AFI Cautious) as a benchmark for portfolios. The AFI provides investors, advisers and analysts with a benchmark for funds that is determined entirely by advisers who are specialists in fund research and selection.

To improve their audit trail, investment professionals can produce date-stamped **Factsheets**, with their company's own logo and disclaimer, and available in PDF format.

A sophisticated **Filter Tool** has been added including:

- search by annualised or non-annualised ratio calculations
- search by different lengths of time that fund managers have been with a fund
- search by funds only in one performance quartile over a particular time period

Financial Express' head of marketing and communication, Paul Wynne says:

"Over the last year we have experienced 250% growth in Analytics business and it's clear that Analytics hits the spot with financial advisers and analysts when it comes to the online delivery of data, portfolio modelling, comparative analysis tools and presentation and reports. Launched only 18 months ago, Analytics has a fast-paced development programme which is able to respond to market needs and drive innovative fund research."

Financial Express is the main provider of fund data and website solutions to the UK financial sector. The company collects daily fund prices for more than 60,000 European and global investments, and is relied upon as the sole or main source of this data by providers (eg Skandia, Standard Life, Hendersons) wrap platforms, fund supermarkets, personal finance websites and financial advisers. Financial Express data is also distributed to the main data vendors, including Bloomberg, Morningstar and Telekurs.

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