DECISION SUPPORT FOR INVESTMENT ADVISORS AND ASSET MANAGERS

With the volume and complexity of investment products steadily growing and regulatory requirements increasing, financial professionals need to provide their customers with even deeper insight into the financial markets and expert investment advice.

PrimeTerminal can facilitate quicker and enhanced advisory and investment processes in these challenging marketing conditions. Providing a wide range of global market data, fundamentals, market moving news, advanced charting, sophisticated analytical tools and real-time portfolio monitoring functions in one single workspace, PrimeTerminal efficiently supports advisors’ workflows and helps investment professionals provide their clients with intelligent, insightful advice and a high level of service.

PrimeTerminal is designed to not only provide a customisable workspace for single users, but also to be shared among departments through dedicated group screens displaying model portfolios, for example.

This functionality can help further enhance efficiency in the investment advisory process, drive sales and support regulatory compliance through ensuring all team members work with standardised information in a consistent manner.

A company’s proprietary content can be seamlessly incorporated into PrimeTerminal. In turn, the desktop can be integrated into a client’s existing system landscapes, such as customer relationship and content management systems or trading platforms. With data and functionality tailored to the specific requirements of financial institutions, PrimeTerminal can not only help cut costs and increase efficiency, but also become an indispensable one-stop tool for providing expert advisory.
INTEGRATION INTO FINANCIAL INSTITUTIONS’ SYSTEM INFRASTRUCTURE

By fully integrating PrimeTerminal into their system landscapes and workflows, financial institutions could further increase their efficiency and are able to sharpen their competitive edge.

Proprietary content, such as research, analyst recommendations or data from other suppliers can be seamlessly incorporated into the financial desktop, providing wealth managers with access to all the information they need via one single workspace.

PrimeTerminal can interface to a bank’s portfolio management applications, CRM or CMS. Alternatively, a solution can be fully tailored to the requirements of a financial institution, with PrimeTerminal being deployed as a private-labelled solution in the organisation’s corporate design.

Interactive Data supports the whole implementation process, from the conception and design of customised versions to content integration, setup of specific user and group screens and security lists to hosting PrimeTerminal. Through a consultation process, we evaluate your needs and help develop an effective solution.

Extensive service and support
- Training and introductory courses
- Multi-language support
- Contact via web-based ticket system, e-mail or phone

Reliable access
- Access from anywhere via web and mobile devices
- Hosted access via internet to servers at Interactive Data’s premises
- Deployed access via internal network to servers at the customer’s and Interactive Data’s premises
- Full mobility through central storage of user-specific settings
- Customised screens and security lists available
- Automated or customer-scheduled software updates and customised installations
COMPREHENSIVE COVERAGE AND FUNCTIONALITY

PrimeTerminal provides access to a great breadth and depth of global market data. The scope of information required can be customised for each workplace. Proprietary data such as research, marketing documents or investment recommendations can be seamlessly integrated into the user interface, providing a consolidated view of the information required.

Content
- Global coverage of real-time/delayed streaming prices, history and times and sales data
- Global coverage of indices, index constituents, benchmarks and yield curves
- Comprehensive global contributed data
- Market moving news from APA, awp, Business Wire, Dow Jones, dpa-AFX and others
- In-depth fundamental and research data such as company reports, consensus estimates, analyst recommendations or funds facts and figures
- Comprehensive reference data including funds, derivatives, ETFs, Options & Futures, stocks and bonds
- Performance, outperformance and risk analysis figures
- Calendar, corporate actions and economic indicator data

ADVANCED CHARTING FUNCTIONALITY
- Perform fully integrated, state-of-the-art technical chart analysis of intra-day and end-of-day data and monitor financial instruments across all asset classes
- Benefit from a wide range of chart indicators, chart types, annotations and pattern recognition
- Send screenshots of selected charts to clients via e-mail with a single click for advisory and documentation purposes
- Compare global yield curves such as government bond benchmarks, interest swaps, deposit curves or economic indicators

Additional benefits
- Benefit from targeted, sophisticated search capabilities, supporting detailed criteria search for each asset class or news filtering and tagging
- Check up to 1,000 historical alerts when responding to customer queries
- Keep up-to-date with corporate, macroeconomic or market events and indicators using an extensive event calendar
- Analyse financial markets, calculate and simulate key figures for various asset classes, such as options, warrants or funds
- Integrate valuable third-party web feeds to complement news according to individual information requirements
- Dynamic data export of real-time and historical information into Microsoft Excel® for further analysis and simulation by using convenient and user-friendly tools such as XLPert or through Dynamic Data Exchange (DDE)
- Use the guided, context-sensitive navigation to access fundamental data reports, chained instruments, calculators, news or events for single or multiple securities
- Benefit from hundreds of predefined screens or overview clips by geography or asset class and use them as a starting point for your own unique views or screens
ANALYSE AND MONITOR PORTFOLIOS

Financial professionals can create, manage and monitor their security lists and portfolios within PrimeTerminal and import them on a customer-specific basis, including current and historical transaction data. Customised visualisations and views of the portfolios further enhance the user experience. Portfolios are context-sensitively integrated with all other PrimeTerminal functionalities, enabling convenient access to news, events and performance charts, for single or multiple securities.

The portfolio screener function is designed to provide advisors with a quick and easy overview of portfolios containing a specific security, allowing them to better react to current market trends.

Monitor the markets while on the move

PrimeTerminal Mobile is available for popular mobile devices including iOS and Android. The application provides the core of the desktop’s content and functionalities, such as charting and alerting.

Through full synchronisation, personal watchlists and alerts are available on both devices. Users have access to real-time quotes, historical and reference data, charts, business news and market overviews, and can check the performance of individual positions or an entire portfolio at any time. They also benefit from the same individual entitlement in terms of content, asset class coverage and depth of history which is available for the desktop solution. PrimeTerminal Mobile’s sophisticated, user-friendly interface allows for individual customisation of the data displayed.
ABOUT INTERACTIVE DATA CORPORATION

Interactive Data Corporation is a trusted leader in financial information. Thousands of financial institutions and active traders, as well as hundreds of software and service providers, subscribe to our fixed income evaluations, reference data, real-time market data, trading infrastructure services, fixed income analytics, desktop solutions and web-based solutions. Interactive Data’s offerings support clients around the world with mission-critical functions, including portfolio valuation, regulatory compliance, risk management, electronic trading and wealth management. Interactive Data has over 2,500 employees in offices worldwide.

For more information please visit www.interactivedata.com or email eu-info@interactivedata.com

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