

The leading solution for investor prospecting and institutional data, seamlessly integrated into Microsoft Dynamics CRM

Ipreo has built a reputation in the capital markets by building and managing the most complete, accurate, up-to-date profiles of money managers and analysts in the industry. Now the entire universe of institutional contact data and profiles is available to you directly within Microsoft Dynamics CRM.

- z Ipreo's powerful platform, BD Advanced, is a highly flexible, global, multi-asset class platform with advanced analytical and screening capabilities
- z Powerful search functionality provides access to over 100,000 institutional contacts and profiles at over 22,500 firms
- z Microsoft Dynamics actions are fully incorporated into the BD Advanced tools and profiles for seamless integration with your workflow

Quick facts

- z BD Advanced is a robust workflow solution and buyside contact database relied on by over 8,000 capital markets professionals globally
- z Global standard for outstanding customer service and data quality
- z Most robust institutional database in the industry, covering equity, fixed-income, hedge funds and a complete range of investor types

The screenshot displays the Microsoft Dynamics CRM interface with the 'BD for Dynamics' extension. The main view shows the 'Institution Search' results for 'Fidelity Management & Research Company'. Below this, a 'Top 10 Holdings' table is visible, and a pie chart shows the asset allocation. A secondary window is open for 'Nicolaas Marais (Nico)', showing his contact details and account information.

Company	Value	Value Change	% Port
Google, Inc. CL A	6,091.98	195.61 ↑	1.43%
Wells Fargo & Company	6,051.69	875.40 ↑	1.42%
Apple, Inc.	5,960.88	654.29 ↑	1.40%
J.P. Morgan Chase & Company	5,443.73	244.00	
Bank of America Corporation	4,170.89	2,095.00	

Technology	22.39%
Financials	16.55%
Consumer Services	12.29%
Healthcare	12.03%
Energy	10.33%

Job Function	Portfolio Manager
Account Name	Barclays Global Investors (U.K.) LTD Investment Manager-Mutual Fund
Address	Murray House, One Royal Mint Ct., London, EC3N 4HH, United Kingdom
Mailing address	Same as physical address
Email	nicolaas.marais@barclaysglobal.com
Telephone	+44 20-7668-8000
Fax	+44 20-7668-8001
Account Type	Investment Manager-Mutual Fund
Style	Index
Orientation	Passive
Activist	No
Strategy	Quantitative
Equity Portfolio Turnover	41%
Total Holdings (USD, mm)	550,000.00
Asset Allocation (USD, mm)	Equity: 83,846.97

Basic Search Options

Quick Results

Saved Searches:

Search in: BD Data Company CRM

Filter by: Equity Fixed Income

Limit To: My Contacts CRM only

Search in Lists: Contact Lists: Institution Lists:

Side: Sell Side Buy Side Either

Show Criteria: Institutions Funds

Name Search: Last Name Starts With Contains And

Advanced Search Options

Personal Information *Search by job type and function, education, biography, personal details.*

Coverage: Equity Fixed Income

Select Coverage:

Institutional Information *Search by institution type, focus, funds.*

Investment Centers & Locations *Filter by Locations ...*

Ownership Search Options

Asset Class: Equity Fixed Income

Company(s): Single Company Single Company, Multiple

Holder:

Theme:

Displaying 1429 People

Table Display: Side

Name	Institution Name	Primary Institution Type	Side	Asset Class	Value BARC_L... USD, mm	Shares (BARC_L...	Share Change Prior Quarter- End (BARC_L...	% S/O (BARC_L...	Actions
<input type="checkbox"/> Cora O'Donohoe	Barclays Global Investors (U.K.) LTD	Investment Advisor- Mutual Fund	Buy Side	Equity	+44 20- 7668-8000	1,818.56	395,951,270	-13,597,876	4.72
<input type="checkbox"/> Nicolaas Marais	Barclays Global Investors (U.K.) LTD	Investment Advisor- Mutual Fund	Buy Side	Equity	+44 20- 7668-8000	1,818.56	395,951,270	-13,597,876	4.72
<input type="checkbox"/> Peter Cockburn	Scottish Widows Investment Partnership, LTD	Investment Advisor- Mutual Fund	Buy Side	Equity	+44 131- 655-8500	1,193.28	259,809,000	-2,475,000	3.10
<input type="checkbox"/> John Russell	Scottish Widows Investment Partnership, LTD	Investment Advisor- Mutual Fund	Buy Side	Equity	+44 131- 655-2623	1,193.28	259,809,000	-2,475,000	3.10
<input type="checkbox"/> Graham Wood	Scottish Widows Investment Partnership, LTD	Investment Advisor- Mutual Fund	Buy Side	Equity	+44 131- 655-8395	1,193.28	259,809,000	-2,475,000	3.10
<input type="checkbox"/> Caroline Silander	Scottish Widows Investment Partnership, LTD	Investment Advisor- Mutual Fund	Buy Side	Equity	+44 131- 655-8500	1,193.28	259,809,000	-2,475,000	3.10

Display Items 1 to 100 of 1429. Page: 1 First 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | ... Last

Our System

- z Our platform provides clean, intuitive search functionality coupled with the most complete, accurate and timely data in the industry
- z Institutional Contact Data and robust Ownership Information are fully integrated within the platform
- z Advanced investor screening & portfolio analytics, with detailed analytics on investor portfolios, provide a holistic view of the investors you are targeting
- z BD Advanced includes global, multi-asset class data
- z Access to BD Daily Hot News for the latest updates in institutional people movements and news
- z All of this is backed by 24-hour support by our renowned, experienced, client services team and account executives

Our mission is to ensure our clients establish personal relationships with the right investors - effortlessly.

About Ipreo

The marriage of deep industry expertise and dynamic innovation, Ipreo brings market-leading intelligence, robust technology, and superior customer service to all participants in the global capital markets. Bringing together state-of-the-art new issuance & trading systems and premier global financial and investor data, Ipreo provides innovative technology and superior insights to all participants in the capital-raising process.