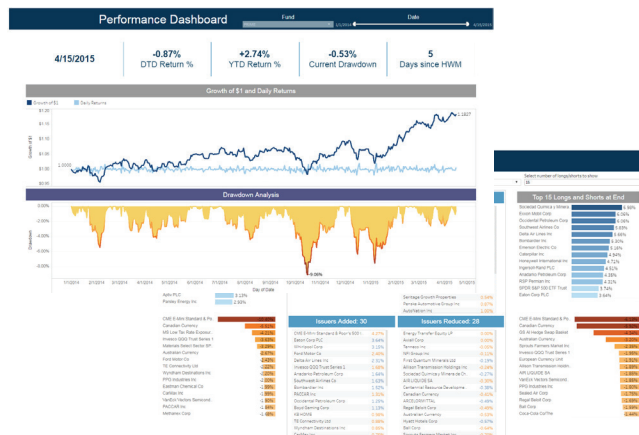


Enhanced analytics and data visualization for faster investment decision making

BROADRIDGE VISUAL ANALYTICS IS A SEAMLESS INTEGRATION BETWEEN THE BROADRIDGE INVESTMENT MANAGEMENT DATA WAREHOUSE AND TABLEAU TO PROVIDE INDIVIDUALIZED ANALYTICS AND CUSTOMIZABLE DIGITAL REPORTS AND INTERACTIVE DASHBOARDS

- Look into and build complex visualizations of data and dashboards
- Build advanced analytics without hiring data scientists
- Robust time series snapshots into the data warehouse from Portfolio Master, including positions, P&L, exposures and analytics
- Blend, join and unify data sets including bespoke, client-specific or third-party data



ACTIONABLE DATA IS AT THE FOREFRONT OF EVERYTHING

Broadridge Asset Management Solutions' new partnership will help satisfy client demand for interactive reporting and visual analytics capabilities. Tableau is a market leader in the Business Intelligence (BI) space with over 16,000 corporate clients and millions of users. Broadridge Visual Analytics is a fully integrated data visualization platform for Broadridge Portfolio Master and Analytics Master clients.

DATA AGGREGATION AND NORMALIZATION IS A CONSTANT PAIN POINT FOR THE INDUSTRY

Tableau's visual analytics platform, combined with Broadridge's best-in-suite software, will provide insights and analytics into trading, portfolio and operations data at the speed of thought.

WHY BROADRIDGE VISUAL ANALYTICS?

Tableau is renowned as an easy to use, powerful BI tool. Many Broadridge client firms are existing users of the software. A new user can quickly become proficient with the solution, enabling them to generate the actionable insights they need to satisfy client and internal reporting demands. Firms can readily deploy existing or new staff with Tableau experience to use the Broadridge solution.

Broadridge Visual Analytics enables you to ask questions of your data, especially large, historical data sets. You have access to reams of financial data, but have limited ability to do powerful on-demand storytelling. With Visual Analytics, we enable you to meet the increasing demands for actionable data from investors, counterparties, creditors and regulators.

Other reporting tools require internal IT resources and data scientists to create queries and dashboards. Broadridge Visual Analytics empowers users to easily create and modify queries and dashboards, without depending on IT resources to implement the changes and requests. Firms can readily deploy existing or new staff with the visual analytics experience.

BROADRIDGE INVESTMENT MANAGEMENT SOLUTIONS REPORTING SUITE



Analytics Master
Data warehouse



Report Manager
Dashboards & reports



Visual Analytics
Data visualization

PORTFOLIO AND ORDER MANAGEMENT

- **Analytics Master:** Customized data models from the data warehouse, and provides a console for integrating with other platforms.
- **Report Manager:** Access all dashboards and reports. Generate data into Excel, PDF, and SSRS reports from Analytics Master's set of standard grid and printable reports.
- **Visual Analytics:** Complex visualizations of data and dashboards.

REPLACE THE CURRENT UNWIELDY PARADIGM WITH ACTIONABLE DATA

Without Broadridge Visual Analytics, data queries are currently answered with a combination of Excel extracts and PDF reports. Data is then:

- Keypunched into time series "databases"
- Massaged (exclusions, toggles, reclassifications)
- Converted to pixel perfect tables and crystallized as a PDF
- Distributed via email

With Broadridge Visual Analytics you minimize current reporting process impediments:

- Automated reporting
- Time series analysis
- Scalable with less errors
- Daily reporting

Broadridge, a global fintech leader with over \$4 billion in annual revenue listed on the S&P 500 index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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Ready for Next

Communications
Technology
Data and Analytics

