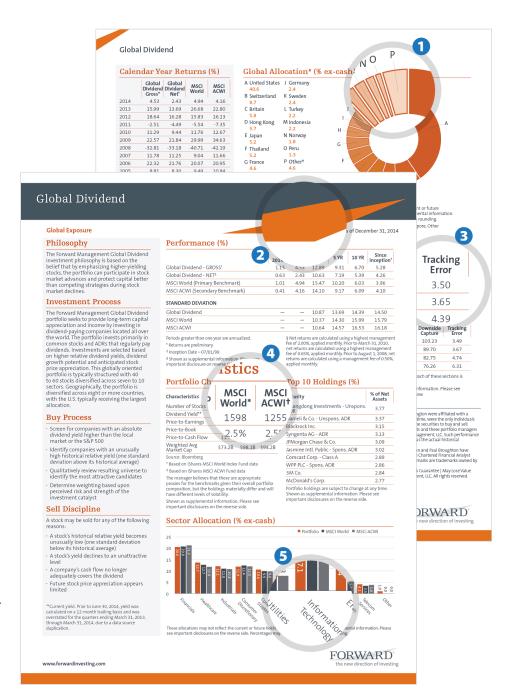# 5 THINGS WE CAN AUTOMATE IN YOUR FUND FACTSHEETS

1 Chart call outs: The use of charts are commonplace in most factsheets but many asset managers fail to provide "easy to interpret" legends and labels. One technique we provide is the ability to have labelled call-outs for each sector in, for example, a pie or doughnut chart with alphabetic labelling so it's easy on the eye and explicit to the reader.

2 Design is critical: We want your factsheets to reflect your brand beautifully and nothing should be lost with automation. With our powerful Adobe based engine we are able to accommodate the most simple, to the most sophisticated of brands and design.

3 Calculations: We provide out-of-the-box calculations for aggregations, allocation calculations, comparatives and many other simple arithmetic requirements that marketers require in order to present data effectively and consistently.

4 Footnotes and Narrative: It's essential that compliance and regulatory footnotes are captured in the disclaimer section of factsheets. However, we place equal emphasis on the way these footnotes are referenced from within the data presentation. We are able to incorporate all types of symbology, numbered footnotes, conditional notes (e.g. Depending on type of fund or share class) and conditional disclaimers based on an array of rules.

5 Chart design: Overlapping, "scrunched up", wrapping - these are all cardinal sins when trying to develop high quality factsheets. Our chart engine is continuously developing to overcome all of these commonly occurring issues. Additionally, our dynamic chart engine extends our ability to provide new and innovative representations.