

PORT <GO> from Bloomberg brings together the critical data and analytical features needed for monitoring and managing your equity portfolios. Using PORT <GO> will allow you to see into your portfolios in new ways and provide greater discoverability so that you can always be one click away from the information you rely on.

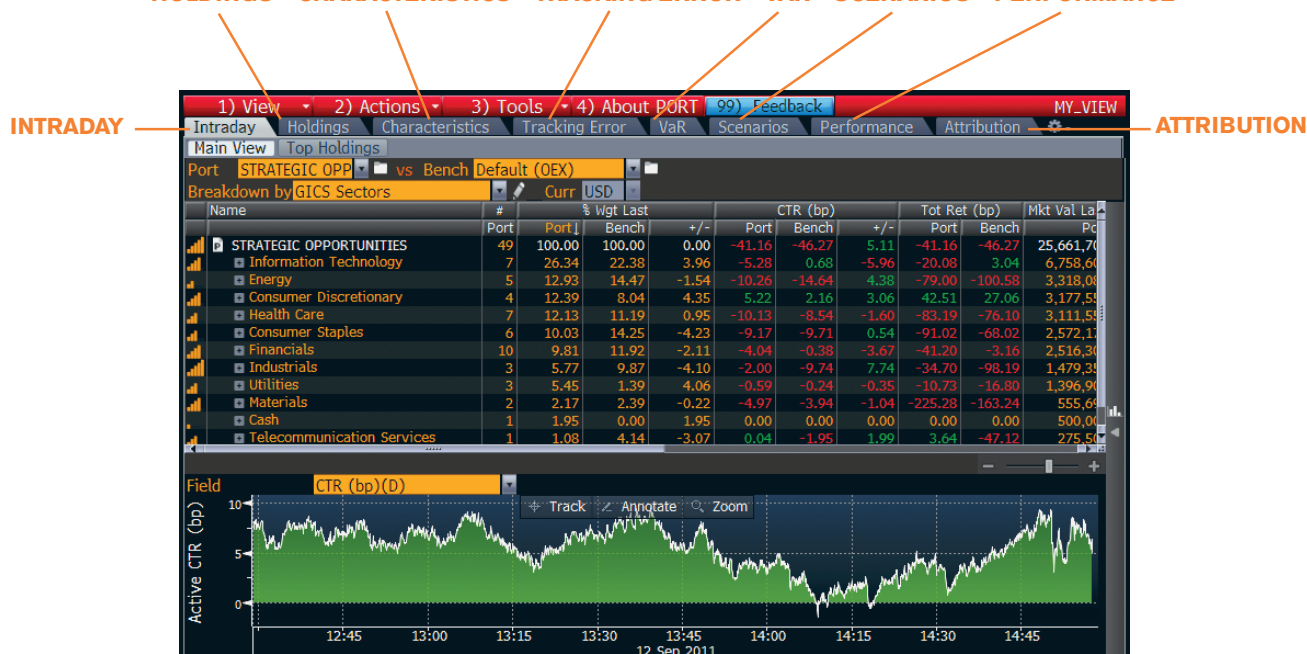
- Seamlessly enhances a Portfolio Manager's daily workflow
- Powers insightful portfolio strategy development
- Offers improved visibility through targeted data
- Provides consistent pricing, weights and return calculation methodologies

PORT <GO> has eight primary data tabs and twenty additional sub-tabs that track the key areas of importance for portfolio and risk management. Each tab is fully customizable to ensure you are in control of what information is displayed. The navigation across and within this application is seamless, allowing you to swiftly change focus at a broad level while retaining the individual portfolio context from a detailed perspective.

Flexible charting capabilities, including Heat Maps and Scatter Plots, are also incorporated into PORT <GO>, allowing you to see a visual representation of your portfolio.

A News Heat indicator is displayed on each of the primary data tabs and measures the amount of news flow activity for each security, sector and portfolio. As the volume of stories increases, the News Heat flag grows in size to increase your awareness of news that may be impacting your investments.

HOLDINGS CHARACTERISTICS TRACKING ERROR VAR SCENARIOS PERFORMANCE



The following section outlines the eight primary data tabs you can leverage to gain better insight into your portfolio.

Intraday

Track the intraday performance of your equity portfolio against benchmarks you choose using real-time data. Track intraday P&L, total return and contribution to return at portfolio, sector and security levels.

Holdings

Start your portfolio analysis with a basic view of current positions, weights and allocations across sector, country or any custom grouping model. Compare your portfolio's sector weights relative to a benchmark. Backdate the analysis to view positions and weights as of a specific date or as a time series trend.

Characteristics

Analyze the fundamental characteristics of your equity portfolio as of a specific date or as a time series trend. Price Earnings Ratio, Dividend Yield and Earnings Growth are just a few of the available metrics you can choose to monitor.

Tracking Error

Analyze your portfolio's ex-ante (predicted) risk by using one of Bloomberg's multi-factor risk models. Display portfolio risk statistics in absolute terms or relative to a selected benchmark, either as of a specific date or as a time series trend.

VaR

Decompose your portfolio's ex-ante risk using Historical or Monte Carlo Value-at-Risk methods. Effectively manage your

portfolio risk by easily determining the overall impact any changes in investment strategy may have on the portfolio's risk profile.

Scenarios

Evaluate your portfolio using a variety of historical stress scenarios like the Lehman Brothers collapse in 2008 or the more recent Libyan Oil Crisis in 2011. Create custom scenarios aligned with your individual views to more accurately measure potential portfolio performance and validate current construction.

Performance

View the historical performance of your portfolio with multiple total return periods. You can look at your portfolio from a specific date or in particular time periods such as 1-day return, 1-month return and YTD return. Also analyze historical risk/return behavior with measures including standard deviation, beta and tracking error.

Attribution

Deconstruct the sources of your portfolio's historical return on an absolute or relative basis. Analyze outperformance or underperformance results against your benchmark by breaking down the portfolio's relative performance into multiple factors including Allocation Effect, Security Selection Effect and Currency Effect.

What-If: Change the existing weights or positions of your holdings, add new securities and rebalance your portfolio using the What-If feature. Determine the hypothetical impact on your portfolio with the additional options to commit suggested trades ideas, or save them to a new portfolio for further analysis.

Optimization: Incorporating the latest advances in optimization technology, Bloomberg Portfolio Optimizer offers portfolio managers advanced capabilities for constructing and re-balancing global portfolios with tailored risk, return and exposure characteristics.

To learn more about Bloomberg's Portfolio and Risk Analytics solution, from your terminal visit **BPR**A <GO> or send a message via **MSG PORTFOLIO SOLUTION** <GO>; or email our team at portsolution@bloomberg.net.

For additional information, press the <HELP> key twice on the Bloomberg Professional® service.

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