



The IPSO Factor

Enriching portfolios with market data



Why The IPSO Factor

*"Give me a lever long enough and
a fulcrum on which to place it,
and I shall move the world."*

Archimedes, 450 B.C.E.



Overview

- Facilitates data analysis by automating data retrieval.
- Standardizes reporting by structuring retrieved data.
- Flexible and extensible across data providers and analysis tools.



Facilitates Analysis

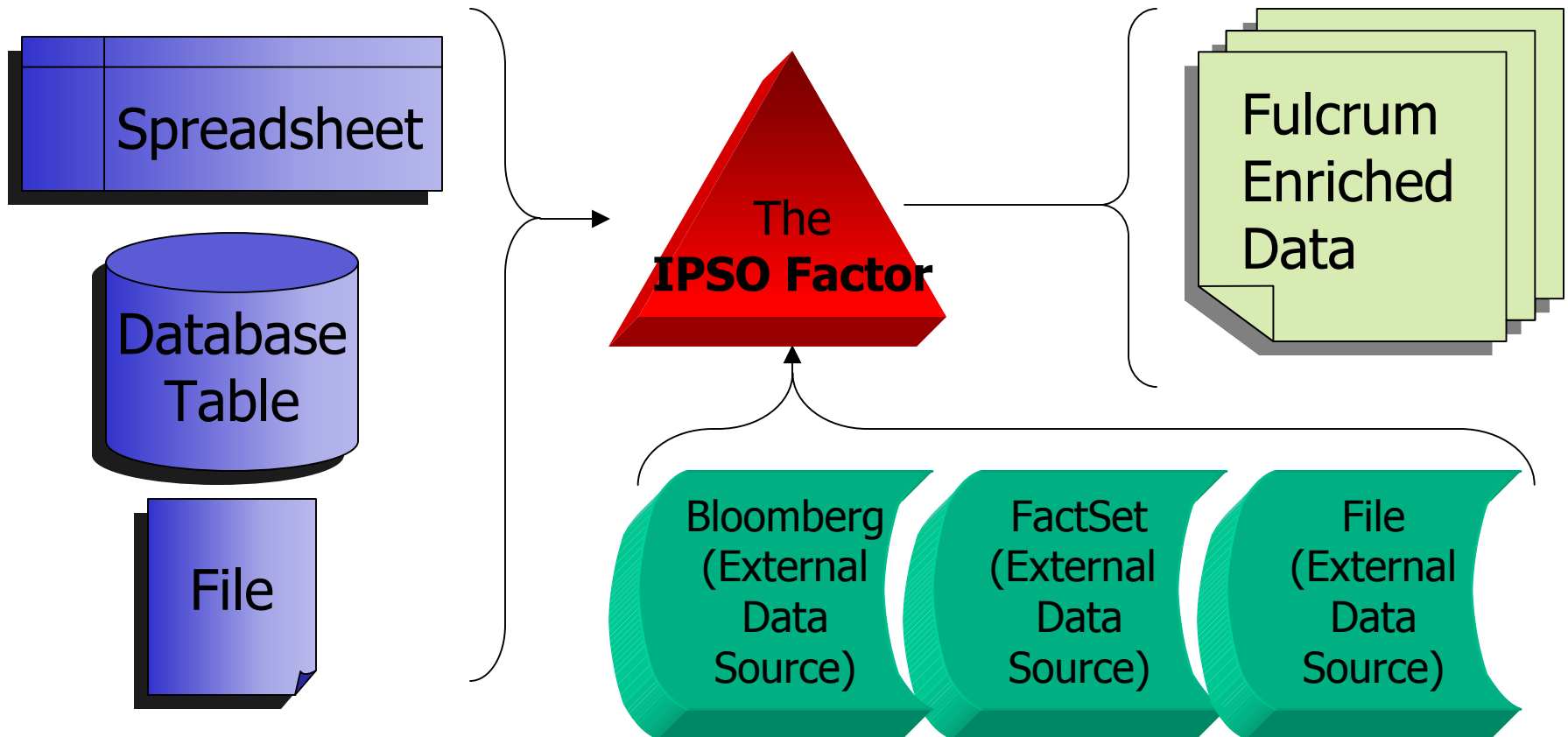
- Ability to access market data easily for many positions at once.
- Reduces learning curve for accessing market data (use the API without programming).
- Ability to easily name and save multiple models or portfolios.
- Ability to easily name and save market data filters.
- Can run automatically.



Standardizes Reporting

- Easily access market data across providers.
- Easily export data in a format that other analysis tools can use.
- Converts data into one common format from multiple data services.
- Allow non-technical users to easily select and extract market data.

Architecture





What **The IPSO Factor** provides?

- **The IPSO Factor** is designed to make market data retrieval easy for a nonprogramming manager or analyst. Using a simple point and click interface, the **The IPSO Factor** user can build a data enrichment rule set that can be reused daily with minimal effort, and can define a source for the financial instruments that need to be analyzed. It allows analysts to analyze and managers to manage rather than program or depend on IT.



Included Reports

- Provides basic static position reporting
 - Last close price
 - Instrument ratings
- All data is exportable in multiple common formats
 - Comma separated (.csv)
 - eXtensible Markup Language (XML)



Customization

- IPSO Incorporated offers business specific customizations for **The IPSO Factor**
 - Custom reports
 - Internal data sources
- Additional market data providers will be supported when demand warrants.
- New releases are regularly scheduled.



Supporting **The IPSO Factor**

- Simple and easy - it is an end-user tool.
- Developers are not needed to support **The IPSO Factor**.
- Optional phone and on-site support is available from IPSO Incorporated.



System Requirements

- **The IPSO FACTOR** is a program layer that runs on top of your existing Bloomberg or Factset data service.

If your machine can support your data provider's software, it can also support **The IPSO Factor**.