

# PSN Logic

Better, Faster, Smarter Solutions

Informa Investment Solutions provides clients a full spectrum of back to front office applications and services. Our unique ability to provide investment professionals with customized systems, data, and services has made us the leading service provider in the marketplace.

For over thirty years, we have serviced both institutional and retail investment professionals by providing them value added solutions. Our clients include financial institutions, brokerages, investment management companies, investment consultants, independent advisors, and pension plan sponsors .

## *It's all about the process*



Informa Investment Solutions proudly announces Logic, a brand new functionality in PSN Enterprise that takes manager research and reporting to an important next level. Logic enables investment professionals to efficiently apply and effectively showcase their

- Intellectual capital
- Fiduciary process
- Research philosophy
- Repeatable process

Every great database has a search and selection function that allows the pros to screen managers down to a select list or finalists, only Logic allows you to show which ones fell from the list at each stage and why. And, only Logic satisfies the increasing need to demonstrate fiduciary responsibility and a repeatable process.

Logic is immediately available to PSN Enterprise Platinum subscribers.

- On the fly **Pass/Fail** analysis allows the user to see search constituents who are successful or unsuccessful for inclusion in the search.
  - **Breakdowns** for constituents can be done for individual search criteria or the cumulative set of selected criteria.
  - “**Force Pass/Fail**” provides the user the authority to be inclusive or exclusive of products that have either failed or passed the search.

# PSN Logic

an **informa** business

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Informa Investment Solutions' products and services have a direct impact on the manner in which our clients interact with the investing public.

We take pride in knowing that, year after year, clients depend on our software and services to fulfill mission critical operations.

- **“Report Card”** offers the user to have more transparency into a product's performance, providing the ability to drill in on a particular manager to see why they passed or failed specific criteria.
- **Advanced Report Writer** delivers on the fly previews of selected criteria, search column definition, advanced sorting with drag and drop functionality, and a “ghost filter” mode for masking criteria from the final report.
- **Smart Exporting** gives the user the ability to export their custom reports to Excel with a record of the Filter Constituents and their individual and cumulative pass/fail analysis.
- **New Criteria Search** enables the user to quickly and easily find criteria by name for use within a product search enabling prioritization of criteria within a research construct.
- **“Beats”** functionally allows querying based on exceeding a benchmark, over a percentage of multiple time frames, for each criterion. Similar to PSN's Batting Average, Beats can be calculated for every statistic.
- **Formula** feature allows for the creation of custom algorithms for assigning weightings to specific criteria for use within queries and numeric function allows numeric values to be assigned to non-numeric criteria for use within queries.
- All queries can easily be seen in PSN's **“Quick View” Reports**, be saved as universes, and shared across the enterprise.

Put Logic to work for you today! Contact PSN Client Services today for a personalized tour or training on Logic or any aspect of PSN's manager research and due diligence solutions.

## **Contacts**

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