

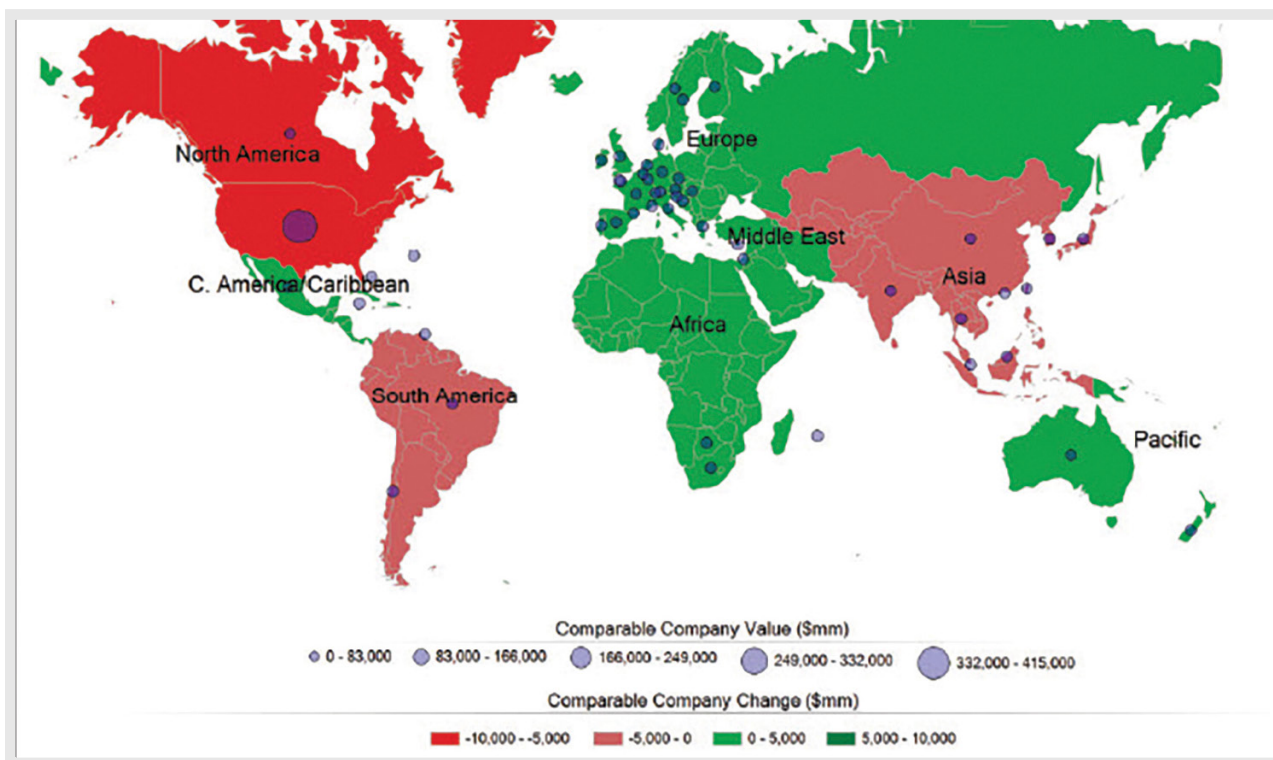
Pitch Builder

Easily create professional, custom-branded pitchbooks

Our Pitch Builder reporting solution allows users to save time on building, refining, and customizing sales presentations. Easily generate detailed pitchbooks to target investors and analyze ownership for corporate access and capital markets origination. Exportable pitch book formats are PDF, Excel, Word, and Powerpoint.

Analyze ownership data

- Top holders — institutions and mutual funds
- Top buyers and sellers
- Historical ownership trends
- Analyze investor base by geography, style, turnover

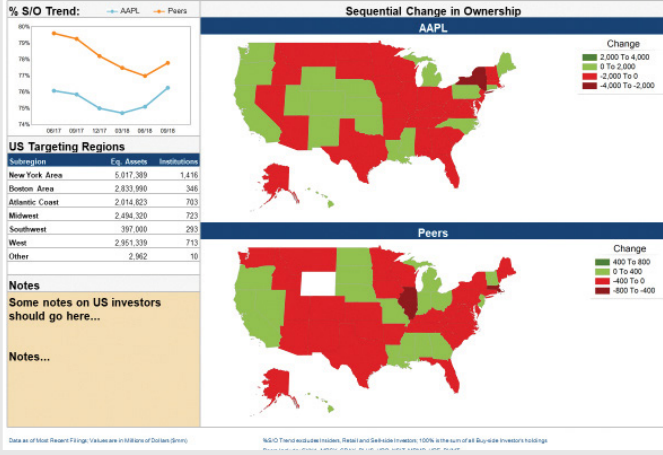


Target and analyze investors

- Target investors by purchasing power, over/under-weight analysis
- Custom algorithms built to filter and search for subsets of potential investors
- Map clients by region and sector
- Filter for top client accounts
- Filter top investors by industry or peers

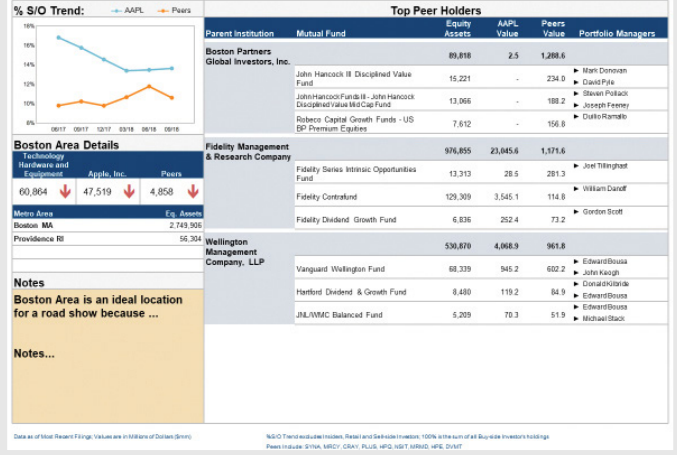
Targeting analysis - United States Apple, Inc. (AAPL) vs. Peers

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Targeting analysis - Boston Area Apple, Inc. (AAPL) vs. Peers

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Top 30 Institutional Ownership of Peers

Institution	Equity Assets	Peer Value	Peer 1		Peer 2		Peer 3		Peer 4	
			Value	Value Δ	Value	Value Δ	Value	Value Δ	Value	Value Δ
The Vanguard Group, Inc.	1,497,833	31,768.3	5,578.8	121.3	4,897.7	669.2	3,228.5	82.2	2,954.4	-15.7
State Street Global Advisors (SSgA)	938,907	26,778.1	4,710.2	-437.4	3,567.4	-352.4	2,584.2	-178.7	2,362.9	-126.1
BlackRock Fund Advisors	1,194,883	22,161.7	4,074.9	34.7	3,285.9	-88.4	2,371.3	25.6	2,135.9	-57.1
Fidelity Management & Research Company	809,853	20,267.0	2,170.8	-306.2	3,752.6	-8.6	945.9	-186.3	608.8	-125.7
Capital World Investors (U.S.)	547,125	15,981.9	9,999.4	-1,245.4	261.3	123.5	429.4	-408.8	2,136.3	168.9
Wellington Management Company, LLP	402,168	12,345.3	1,070.3	99.1	3,512.6	63.0	827.6	-679.0	697.9	546.0
T. Rowe Price Associates, Inc.	479,250	9,777.0	1,548.3	-437.1	1,241.0	134.4	958.6	-699.3	325.3	-184.0
Capital Research Global Investors (U.S.)	390,231	8,492.4	3,150.9	-283.1	1,036.6	-	-	-	817.8	106.1
Northern Trust Investments, Inc.	286,479	7,359.1	1,421.3	-91.7	1,079.7	-60.2	662.0	-51.2	827.6	-67.9
J.P. Morgan Investment Management, Inc.	221,394	6,037.5	2,050.1	15.0	962.2	61.2	430.9	-303.4	38.2	-11.7
MFS Investment Management	238,090	6,149.2	5	-1	1,670.2	20.2	319.2	-4.2	1,195.1	61.9
TIAA-CREF Investment Management	253,403	5,059.0	1,208.4	-16.7	648.9	49.7	648.9	-40.1	414.2	-101.4
AllianceBernstein, L.P. (U.S.)	138,651	4,796.6	966.7	01.3	1,055.5	306.9	506.0	11.3	153.1	-4
BlackRock Advisors, LLC	262,491	4,626.2	1,341.3	34.6	770.2	-80.5	521.1	-35.1	448.1	28.0
Norges Bank Investment Management (Norway)	524,282	4,566.4	890.5	-559.9	671.2	-77.9	502.5	-42.1	420.1	-34.4
Geode Capital Management, LLC	165,561	4,519.6	829.0	6.5	682.5	5.5	489.1	4.3	428.6	-5.9
Mellan Capital Management Corporation	172,004	4,247.2	760.0	52.4	953.5	-16.5	377.4	8.1	496.6	89.3
Columbus Management Investment Advisers, LLC	152,541	3,971.6	717.5	65.0	734.1	141.5	286.7	138.5	273.5	67.7
Jennison Associates, LLC	107,691	3,913.4	42.8	-1	62.9	-7.2	-	-477.2	914.2	-42.4
Invesco Advisors, Inc.	177,017	3,443.7	72.5	-45.4	524.4	-42.8	982.0	-4.5	373.3	-18.2
BNY Asset Management	121,247	3,211.5	662.1	-5.8	480.9	-17.6	277.6	7.5	375.8	-15.2
Davis Selected Advisers, L.P.	39,172	3,177.9	-	-	856.0	-1,618.7	-	-	954.5	-112.0
BlackRock Investment Management (U.K.), LTD	327,034	3,170.8	508.5	-78.6	577.7	-2.6	348.0	22.2	350.2	23.7
Invesco PowerShares Capital Management, LLC	80,647	2,879.6	175.7	144.9	72.5	-	820.8	-10.8	660.5	-25.0
Magellan Asset Management Pty. LTD	14,661	2,793.5	-	-	-	-	1,105.1	42.9	-	-
Legal & General Investment Management, LTD	262,319	2,726.8	509.4	-15.3	410.7	-13.3	267.1	-7.4	264.3	-15.9
Delaware Investments	57,793	2,709.9	19.3	-3.0	494.2	-5.5	852.4	201.2	44.7	-4.3
Viking Global Investors, L.P.	24,095	2,477.4	-	-	-	-	-	-	-	-

Investor	Equity Assets	Style	City	Metro Area	State	Country	Region
The Vanguard Group, Inc.	3,193,120	Index	Malvern	Philadelphia PA/Wilmington DE	Pennsylvania	United States	North America
BlackRock Fund Advisors	2,982,000	Index	San Francisco	San Francisco/San Jose CA	California	United States	North America
State Street Global Advisors (SSgA)	1,377,120	Index	Boston	Boston MA	Massachusetts	United States	North America
Fidelity Management & Research Company	978,895	Stock	Boston	Boston MA	Massachusetts	United States	North America
T. Rowe Price Associates, Inc.	744,200	Stock	Baltimore	Baltimore MD	Maryland	United States	North America
Norges Bank Investment Management (Norway)	651,000	Value	Oslo	Oslo	Norway	Europe	Europe
Capital World Investors (U.S.)	600,280	Value	Los Angeles	Los Angeles/Pasadena CA	California	United States	North America
Wellington Management Company, LLP	530,870	Value	Boston	Boston MA	Massachusetts	United States	North America
Capital Research Global Investors (U.S.)	485,872	Value	Los Angeles	Los Angeles/Pasadena CA	California	United States	North America
J.P. Morgan Investment Management, Inc.	422,957	Value	Austin	Austin TX	Texas	United States	North America
BlackRock Investment Management (U.K.), LTD	405,127	Growth	London	London	United Kingdom	Europe	Europe
Geode Capital Management, LLC	405,600	Index	Boston	Boston MA	Massachusetts	United States	North America
Northern Trust Investments, Inc.	286,479	Value	Chicago	Chicago IL	Illinois	United States	North America
BlackRock Advisors, LLC	262,491	Value	New York	New York/Southern CT/Northern NJ	New York	United States	North America
TIAA-CREF Investment Management	253,403	Stock	New York	New York/Southern CT/Northern NJ	New York	United States	North America
J.P. Morgan Investment Management, Inc.	221,394	Stock	New York	New York/Southern CT/Northern NJ	New York	United States	North America
MFS Investment Management	238,090	Value	Boston	Boston MA	Massachusetts	United States	North America
Capital International Investors	220,800	Stock	San Francisco	San Francisco/San Jose CA	California	United States	North America
Charles Schwab Investment Services (U.S.)	217,000	Value	Boston	Boston MA	Massachusetts	United States	North America
Invesco PowerShares Investment Management, LTD	212,792	Index	London	London	United Kingdom	Europe	Europe
BNY Asset Management	180,790	Index	Boston	Boston MA	Massachusetts	United States	North America
JPMorgan Chase Investment Management, LLC	180,116	Aggressive Growth	Detroit	Detroit MI	Michigan	United States	North America
Legal & General Investment Management, LTD	156,436	Index	San Francisco	San Francisco/San Jose CA	California	United States	North America
AllianceBernstein, L.P. (U.S.)	183,515	Value	New York	New York/Southern CT/Northern NJ	New York	United States	North America

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