



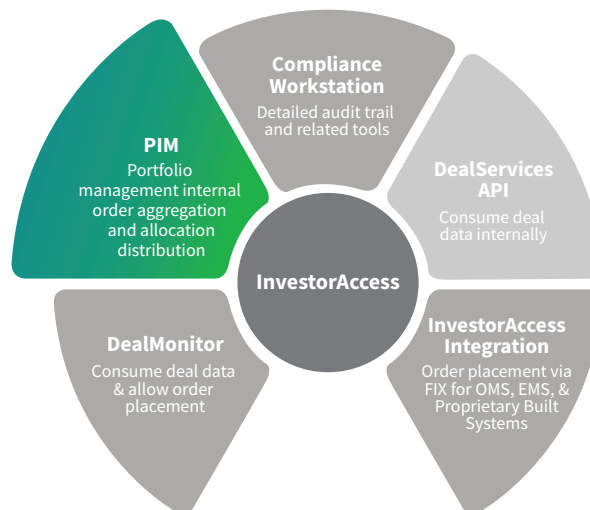
## Primary Indication Management

**Determine demand, place aggregate orders, and distribute allocations on new issues**

Primary Indication Management is a workflow tool designed for Portfolio Managers and Traders to determine demand for new issues and distribute partial allocations across funds.

### A component of our buyside platform for primary issuance

Multiple solutions work together to optimize the new issue process for the buyside community. One of those solutions is Primary Indication Management, intended to streamline the workflow within a buyside firm to add efficiency and reduce operational risk.



### Timely and systematic information delivery

Primary Indication Management gives you the ability to collaborate on new issuance across your firm and coordinate deal announcement distribution and aggregated indication of interest.

Portfolio Managers have access to real-time new issuance information and can place internal orders, including limits, at a sub-account level to be sent to the trading desk.

The Trader will see internal demand build in real-time while addressing multiple limits and can indicate an aggregate order to the syndicate banks.

As deal terms change and internal orders are adjusted, our Aggregation Worksheet makes it easy for a Trader to clearly understand internal demand and reconcile this with what has been reflected to syndicate – allowing the trader to determine when action is necessary.

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Select the tranches you would like to send to the External Order Form

<input type="checkbox"/> Select All		Internal Incremental	Internal Cumulative	External Incremental	External Cumulative
▼	Red Test Investment Management - FI Test				
<input type="checkbox"/>	▼ 5Y <span style="float: right;">Current Level: 35   Eval Level: <input type="text"/></span>	16,000,000	16,000,000	16,000,000	16,000,000
▼	Limit - Spread Mid Swaps	6,000,000	16,000,000	6,000,000	16,000,000
▼	Limit - Spread 35	3,000,000	16,000,000	3,000,000	16,000,000
	Intermediate Term Bond Index	1,000,000			
	World Opportunities	2,000,000			
▼	Limit - Spread 30	3,000,000	13,000,000	3,000,000	13,000,000
	Corporate Income Fund	2,000,000			
	European Bond Fund	1,000,000			
▼	Reoffer	10,000,000	10,000,000	10,000,000	10,000,000
	Corporate Income Fund	2,000,000			
	European Bond Fund	2,000,000			
	Retirement 2040	5,000,000			
	Strategic Income Fund	1,000,000			

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Allocations will be communicated to the Trader at an aggregate level for the firm in InvestorAccess. The Trader will pass allocations into Primary Indication Management where they can be allocated to the Portfolio Manager or sub-account. The Portfolio Manager will be able to see their allocations in the Primary Indication Management module when it is released by the Trader.

A Final Trade Report is available for each deal or range of deals which can be shown and exported at a Firm or sub-account level.

All information related to deal terms, book states and internal actions (such as order placement, modification, etc.) are captured in a comprehensive audit trail and preserved after the deal is complete.

### Connectivity to existing systems

Workflows and data can be integrated into legacy third-party or in-house systems using industry standard protocols.

### Integrate with the full buy-side suite

Our order workflow is designed to integrate and connect seamlessly with other components of our buy-side suite of solutions, which include DealMonitor, InvestorAccess, DealServices API, FIX connectivity, and ComplianceWorkstation.

## More information on Primary Indication Management

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