



News

Boston

London

Melbourne

Paris

Singapore

July, 2007

Best Portfolio Management System – Charles River Stands Firm

Excerpt from Waters recapping Charles River's third consecutive Readers Choice Award

Charles River Development claims top spot in the best portfolio management system (PMS) category for the third consecutive year. The Boston-based vendor's Charles River Manager, a module of the vendor's Investment Management System (IMS), once again proves to be a valuable tool for enabling investment managers to create and implement ideas across portfolios.

Charles River's system consolidates all of the data, tools and connectivity required for successful and efficient portfolio management, with services ranging from modeling and rebalancing to "what if" analysis and order generation. Charles River Manager assists managers with decision support and order generation and efficiently communicates information to the dealing desk. The system allows investment data to be efficiently organized and offers tools to support investment decisions, from their inception to execution. This can be done whether the driver of portfolio activity is a contribution or withdrawal, gain or loss harvesting, sector or country exposure, or a periodic portfolio rebalance.

Charles River Manager has been updated over the past 12 months to support credit and interest rate derivatives with exposure management tools, relevant analytics, and compliance/deal capture features. Furthermore, the portfolio management analysis tools —delivered via Charles River Anywhere, the new Web-based portal to the vendor's IMS — allow managers to obtain access to their enterprise portfolio management system and order management system remotely. Charles River has this year enhanced model and benchmark analysis and rebalancing features, real-time market data integration and real-time decision-support capabilities in an effort to retain its position.