



## Customized Sourcing

# Data and Applications à la Carte

As an application service and market data provider, Interactive Data's product range is designed to offer financial service providers numerous options for outsourcing. These include routine tasks, as well as projects for which financial service providers do not have internal expertise. Depending on a firm's requirements, Interactive Data can support business operations, customer advisory services, or technology departments. This is designed to allow firms to decide the extent to which they want to outsource tasks to Interactive Data. Whether outsourcing the technical infrastructure for managing market data, programming and integration projects, or consulting and conceptualization issues, Interactive Data has customized offerings for financial service providers..

### **Strategic Consulting for Individual Solutions**

With 40 years of experience in the financial markets, Interactive Data offers clients expertise and resources in developing solutions designed to meet clients' needs.

Customers also benefit from the company's experience with Internet technologies, as well as the latest web design and usability trends. In addition, over the course of its longterm relationships with financial service providers and media portals, Interactive Data has developed a strong grasp of the processes and requirements of financial institutions. Indeed, strategic consulting during the preparatory phase of a project is one component in the company's portfolio of services. Customerspecific requirements are closely analyzed to determine the optimal solution. Driven by the question, "Is there an even better solution than the one planned?" benchmark analyses and reality checks are performed, cross-industry best practice examples are considered, and cost efficiency is evaluated.

### **Design and Integration of Web-based Solutions**

Financial service providers can select from a wide range of options for customized, web-based financial information applications with Interactive Data's PrimePortal offering. Depending on the requirements, this can involve the creation of a completely new application, or the expansion of an existing system. Interactive Data handles the programming, takes care of the technical integration into the customer's infrastructure, and manages the hosting. Proprietary data, such as product and marketing information, or entire customer portfolios can be integrated into the application, which enables the addition of powerful information and advisory tools for financial advisors and wealth managers.

Financial market portals operated by financial service providers and media companies are another space where PrimePortal solutions may be of use. Such portals can be completely relaunched, expanded by additional functions, or redesigned, to provide investors with financial information and analytics tools – including the option to directly connect to the order system of a bank in order to allow users to immediately execute their trading decisions. Customers can profit from Interactive Data's longstanding market experience, technical expertise, and knowledge of bank processes.

### **Financial Market Data Management**

Financial service providers and media portals can also outsource their financial market data management to Interactive Data. For instance, this service can help with collecting data about new financial products.

A recent example is the recommendation from the Committee of European Securities Regulators CESR regarding key information documents for mutual funds which are expected to become mandatory in 2011. Interactive Data can offer support in compiling the contents of these data sheets for funds, which, in addition to product master data and product descriptions, also provide information about up-to-date key figures and performance data in the form of charts, heat maps, or other visualizations. The dynamic data sheets are



linked to Interactive Data's powerful market data platform Market Data Gateway, so that they are updated every time they are opened, and can be easily integrated into financial information pages.

### **Data and Services for Developers**

The PrimeDeveloper offering from Interactive Data is an option for companies that run their own in-house IT departments for application development and maintenance but do not want to utilize resources to operate their market data platform and manage financial market data. Application programming interfaces (APIs) for the Java, Java- Script, PHP, and .NET programming languages let developers access the Market Data Gateway and thus a wide range of financial market data and analytics tools. Prime-Developer also offers the option to utilize different service bundles – from data delivery in the form of intelligent data packages, so-called objects, that are already enhanced with business logic, to a comprehensive set of functionalities and widgets that the new Web Toolkit product offers for rapid configuration of websites. To support developers working with these tools, Interactive Data offers training courses in using the Market Data Gateway and its interfaces. To facilitate better project planning, test accounts can be used during the preparation phase of a development project.

### **Strong Service Provider in Difficult Times**

With its flexible approach and array of options for customized sourcing, Interactive Data is a strong service provider to banks, online brokers, and media companies that aim to increase the efficiency of advisory and sales processes and focus on their core competencies. The trend is towards more such outsourcing. According to research from Cap Gemini, "the [German] survey participants will reduce their proportion of internal activities related to developing, operating, servicing, and maintaining their IT systems in the coming years. As compared to the current average ratio of about 44 percent in-house development of software, that portion will drop to 38 percent within the next five years."



**About Interactive Data**

Interactive Data Corporation (NYSE: IDC) is a leading global provider of financial market data, analytics and related solutions to financial institutions, active traders and individual investors. Interactive Data, headquartered in Bedford, Mass., has approximately 2,400 employees in offices located throughout North America, Europe, Asia and Australia.

Interactive Data's Managed Solutions business is a leading provider and operator of customized financial information systems. The group builds and manages Web-based financial market data portals and terminals for a range of organizations worldwide, from retail and investment banks to asset managers, online brokers, stock exchanges and media portals. By aggregating a broad set of financial data and client-proprietary content and offering visually stunning features such as charts, sophisticated search functions, decision-support tools and analytics, these intuitive applications can help customers optimize their business processes and realize efficiencies. This group is managed as part of the Interactive Data's Real-Time Services business, which provides a comprehensive suite of offerings that includes PlusFeed<sup>SM</sup>, a consolidated, low-latency digital datafeed.

**For more information about Interactive Data and its businesses, please visit [www.interactivedata.com](http://www.interactivedata.com).**

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