

PowerLink

Streamline your firm's workflow by integrating PerTrac and Excel

- Commingle PerTrac data with data from other sources as inputs for your own custom Excel functions
- Pull advanced PerTrac statistics into Excel
- Add tables and charts from your PerTrac reports into PowerPoint presentations and Word documents
- Edit or create fund universes directly from Excel

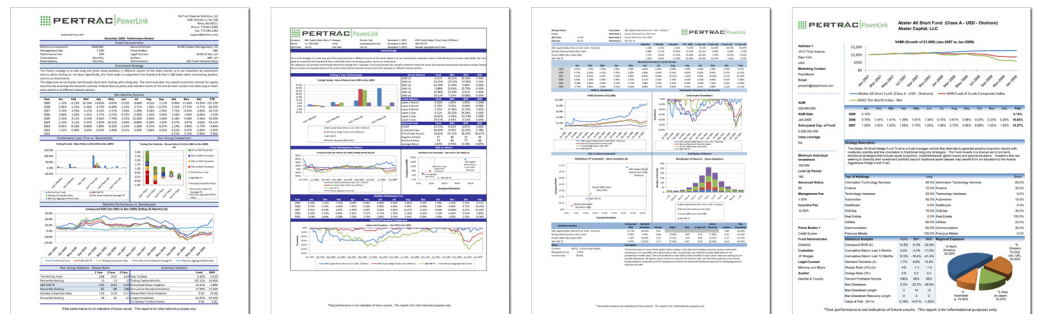
Discover new reporting and analysis possibilities with PerTrac PowerLink, a Microsoft Excel add-in that lets you access data and statistics in PerTrac Analytics using a convenient toolbar installed in Excel. You won't need to return to Analytics—or even have it open on your computer—to leverage many of its capabilities.

- Import data and statistics from Analytics and combine them with models and reports you maintain in Excel and other, external Excel-linked applications.
- Export performance time series (returns and NAVs) and qualitative data fields from Excel into Analytics, where they can be used for screening and reporting.

The Ultimate Reporting Solution

Limitless custom reporting possibilities are available by including PerTrac data and statistics in Excel-native charts and tables. You can start with a PerTrac-provided report template, or build your own from the ground up—a user-friendly wizard guides you through the process.

- Use the full range of Excel's formatting options to create professional-quality, branded reports for distribution to internal and external clients.
- Update your monthly report with the most-recent data in Analytics using PowerLink's instant data refresh feature, which allows for updating at both the worksheet and the workbook level.
- Add tables and charts from your reports into a presentation by simply linking report elements to a PowerPoint file.
- Generate a report based on multiple funds and multiple benchmarks using elements from multiple PerTrac sources.



Advanced Analytics

PowerLink isn't just a powerful tool for creating sophisticated reports for distribution to clients and prospects. It also facilitates critical workflow functions, such as risk analysis and accounting. PowerLink lets you:

- Commingle PerTrac data with data from other sources as inputs for your own custom Excel functions, including advanced analytics such as multiple regression and factor analysis.
- Pull advanced PerTrac statistics into Excel, including VaR, Modified VaR, ETL (CVaR), Modified ETL (CVaR), Omega, rolling skewness and rolling kurtosis.

PowerLink requires Excel 2003, 2007, or 2010.

PerTrac provides sophisticated analytics, reporting and communications software and services for investment professionals, including pensions, family offices, hedge funds, long-only managers, sovereign wealth funds, endowments, funds of funds and industry service providers. PerTrac software is used by more than 1,400 clients in 50 countries to help them maximize returns, reduce risk and operate more efficiently.

For more information
or to schedule a demo:

New York
+1 212 661 6050

London
+44 (0)20 7651 0800

Hong Kong
+852 2526 9780

sales@pertrac.com
pertrac.com