



# NORTHFIELD

## Introducing Nexus

Northfield is pleased to announce the availability of NEXUS, Northfield's fully integrated online platform. Since its founding, Northfield has been a leader in financial analytics and pioneered desktop capabilities at our inception. As technologies have advanced so have the services Northfield provides. NEXUS is the next evolution in Northfield's arsenal of products. Below we walk you through NEXUS system capabilities:

Northfield is introducing NEXUS, our online platform that provides the complete functionality of our locally installed analytical software, along with many new capabilities. NEXUS accesses all Northfield proprietary data. Our Everything, Everywhere range of thirty factor risk models that cover more than five million global assets across equities, fixed income, funds, derivatives, and alternatives is easily accessed within NEXUS, and seamlessly integrated for ease of use. Northfield assessments of risk and manager skill for more than one hundred thousand global funds is also included along with granular risk analysis of more than ten thousand alternative investments including private equity partnerships, commercial real estate, and infrastructure. Nexus also carries Northfield credit risk assessments of more than sixty thousand global firms along with our exclusive sustainability forecasts for all publicly traded operating companies worldwide.

NEXUS provides four types of workflows: interactive analytics for analysts and portfolio managers accessible from any web browser along with large batch operations that can handle processing of thousands of portfolios at a time to streamline wealth management organizations.

Northfield also focused a lot of energy on providing fully autonomous scheduled reporting to regulators and senior management along with a full array of APIs and SaaS tools to integrate Northfield analytics into an investment organization's in-house systems.

All the functions of our stand-alone applications have been replicated. Integrated into NEXUS are risk reporting via our full array of factor models, portfolio optimization (including taxes), transaction cost estimation, and performance attribution has been fully integrated into NEXUS. Several new functions are available in NEXUS including multi-period scenario analysis and stress testing along with our propriety Complete Attribution ("CAtt") which is a specialized form of performance analysis for quantitative asset managers.

In the next few months, additional analytical capabilities will be added to the NEXUS platform including our WB wealth management system addressing private wealth financial planning, asset allocation and asset location. WB will then interoperate with the existing taxable optimization capabilities to provide a complete wealth management solution. The PODS method of performance analysis which incorporates Monte Carlo simulation of alternative portfolios to reach statistically significant results quickly for both live accounts and research is also included in the offering.

Automated importation of portfolio holdings from over one hundred sources including custody banks, hedge fund administrators, and accounting systems adds to the robustness of Northfield's offering. This automated data flow significantly streamlines portfolio data management. An automated reconciliation of data exceptions (e.g. ID conflicts) eliminates the need for most manual intervention.

NEXUS is a hybrid cloud system and all applications are web browser accessible with modern user interfaces and interactive graphics. Most operations are Microsoft Azure cloud based with some specialized functions hosted in our internal data center. Users can elect to keep portfolio holdings maintained inside a data warehouse certified compliant with the highest standard (SOC-2) for data security.

Please contact Northfield sales or our client services group if you have any further questions on Nexus, [sales@northinfo.com](mailto:sales@northinfo.com), 617.208.2050.