

- Case Study: Private Banking
Bank Sarasin

Increasing Efficiency With PrimeTerminal

Interactive Data Managed Solutions' PrimeTerminal Financial Desktop Supports Private Banking And Asset Management With Process Optimization

When Swiss Bank Sarasin launched a comprehensive program in 2003 to increase company efficiency, the bank determined that its existing terminal systems were too cumbersome and expensive for its private banking and asset management needs. Sarasin decided to replace the terminals and following a call for proposals, the bank selected Interactive Data for its ability to provide a customized solution to help meet its specific needs. The result of the joint effort was the first version of the PrimeTerminal real-time information terminal, a financial desktop solution designed for private banking and asset management.

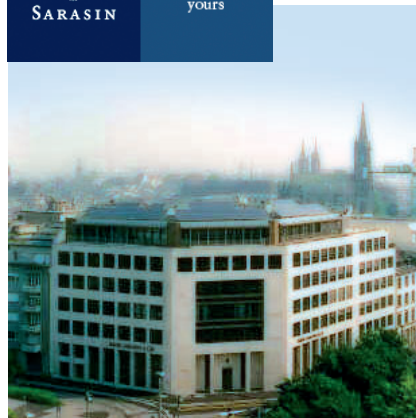
Interactive Data specialists initiated the project by conducting in-depth discussions with the bank's financial experts, asset managers and specialists to develop a thorough understanding of private banking and asset management processes. Focusing on users' content needs as well as on providing a user-friendly system with powerful analysis tools, the project team developed a Java-based financial market information system that could be customized to meet individual user requirements. And because the solution did not require a market data infrastructure, the bank can realize significant annual cost savings now and on an expected ongoing basis.

Customized Content

PrimeTerminal delivers data on stocks, bonds, futures and options. A permission system controls individual user access rights to data, providing opportunity to reduce and contain expenses by eliminating unnecessary subscriptions.

"PrimeTerminal includes the market data that our employees in private banking and asset management need. The data meets our requirements in terms of scope and costs," explains Urs Treier, Vice President Market Data at Bank Sarasin.

Another key requirement for the bank involves proprietary content. Until the release of PrimeTerminal, Bank Sarasin's analysts and investment strategists sent their recommendations to financial advisors and asset managers by fax, letter or e-mail. As the amount of data increased,



Managed Solution for Sarasin

- User-friendliness and easy handling without training effort, e.g. for special security code systems
- Control of individual access rights via sophisticated permission system
- Customized costs
- No investment in a complete market data infrastructure necessary
- Sophisticated, fault-tolerant search functionalities, designed to deliver useful results even with misspelled requests (ie., "Hewled Packard" instead of "Hewlett Packard")
- DDE interfaces - for the direct export of financial data into spreadsheets
- Drag & drop functionality
- Broadcasting functionality

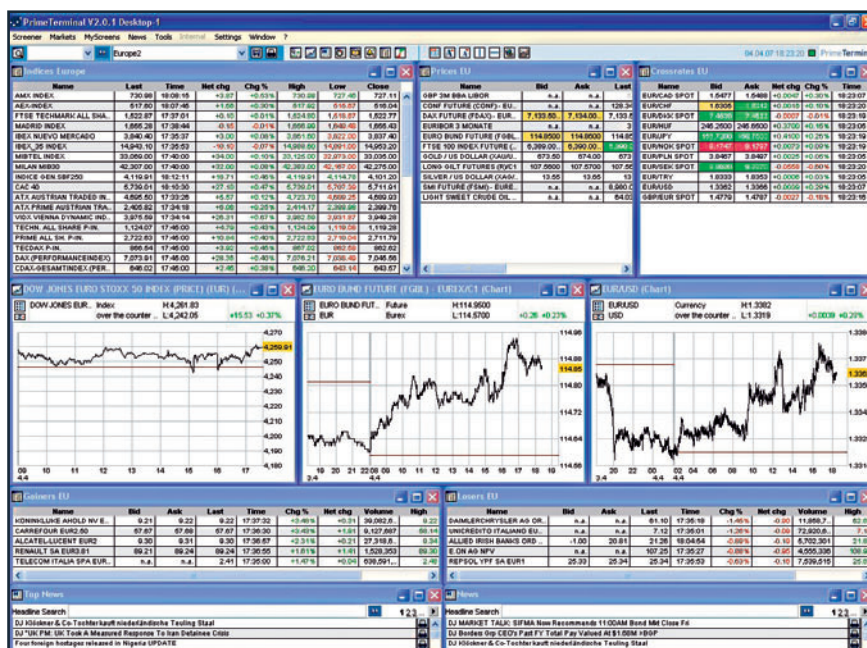
For more information on solutions and services for Private Banking:

www.interactivedata-ms.com

Founded in 1841, Bank Sarasin today is one of Switzerland's leading private banking institutions. Its success is based on trust, confidentiality, expertise and dedication, as well as on the sustainable development of asset management, its core business. The Sarasin Group – headquartered in Basel, Switzerland – is represented in Geneva, Lugano and Zurich as well as in Dubai, Guernsey, Hong Kong, London, Luxemburg, Munich, Paris and Singapore. Bank Sarasin is a limited company. Its shares are listed on the Swiss Stock Exchange, SWX.

recipients found it increasingly difficult to store the information – and to retrieve it again when working with their customers. To address this problem, Interactive Data developed the PrimeTerminal content management process to allow any department within the bank to publish its own content internally. Because PrimeTerminal is based on Internet technologies and open industry standards, advisors and asset managers can not only access internal documents, but also create custom reports as PDF documents.

By integrating proprietary content, PrimeTerminal is designed to promote the exchange of ideas and the development of opportunities in the private banking and asset management business. Bank Sarasin's employees can benefit from the wealth of relevant content for a number of their applications including for



use in discussions with customers and when planning asset management strategies. Urs Treier confirms the success of the project with Interactive Data: "250 employees of Bank Sarasin use PrimeTerminal daily and depend on it as their professional solution. In private banking and in asset management, Interactive Data's real-time information system helps us to underscore our strengths in customer service while saving costs. Interactive Data's pioneering work in terms of contents and technology has paid off."

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Content Scope:

- Data from major financial information providers
- Broad offering of stocks, bonds, futures, options, warrants and certificates
- Internal information such as research results, morning reports, price lists or proposals for portfolio allocation
- FTS View (Pricing and Reference Data)

Product Modules in use:

- Contribution Suite
- Alerting
- Interactive Charts
- Warrant Analyzer
- Bond Analyzer
- Quartile Analyzer
- Currency Calculator
- Risk Return Map