

Nelson Information's

# MarketPlaceWeb™



**Identify**  
your market

**Qualify**  
your prospects



**Transform**  
prospects into clients

# Nelson Information's MarketPlaceWeb

Introducing MarketPlaceWeb, Nelson Information's powerful, innovative web-based solution designed specifically for the business needs of the institutional investment community. MarketPlaceWeb helps your firm maximize its time, resources and skills by putting the tools to identify your market at your fingertips. You'll have the power of the most comprehensive and timely market intelligence, advanced reporting options, unlimited searching and sorting capabilities, anywhere-in-the-world access and charting and graphing features behind every client contact, sales presentation and marketing strategy.

## Who uses MarketPlaceWeb?

The key to understanding, succeeding and profiting in the institutional investment community is recognizing and making the most of the connections between its key players. MarketPlaceWeb illustrates the relationships between institutional investors, consultants and money managers and their investment performance, and reveals new opportunities to establish relationships with top decision-makers.

### Asset Managers

With detailed information on investing styles, as well as insight on sponsor-consultant-manager relationships, MarketPlaceWeb helps identify your best prospects among more than 19,000 pension and 401(k) plan sponsors, endowment funds, foundations and hospitals. You'll be fully prepared for sales calls and presentations, armed with the most accurate and up-to-date information on your prospects and graphs and charts showing how you stack up against your peers.

### Pension Consultants and Plan Sponsors

When you're responsible for investing millions of dollars, you demand the most current, accurate, and thorough manager search data available. MarketPlaceWeb includes information on over 2,400 firms, 5,000 separate account

products and 1,500 investment management institutional-class mutual funds. World-class performance analytics using our unique monthly performance database are delivered in MarketPlaceWeb through our alliance with Strategic Financial Solutions.

### Research/Trading Providers

How do you stand out among the 400 institutional brokers who are all chasing the same portfolio managers? Educate yourself on their investment strategy. MarketPlaceWeb provides over 250 data points for more than 8,400 investment products, mutual funds and hedge funds. You'll know at a glance if they're market timers or sector rotators, long, short or long/short, and if they are exceeding or trailing market benchmarks.

**"MarketPlaceWeb is like a GPS. It helps me pinpoint the best prospects and gets me past the gatekeepers to the decision-makers. Bottom line, MarketPlaceWeb saves me the blood, sweat and tears that I used to spend on my prospecting efforts."**

*—John Lustgarten, Director of Finance, CIM Group LLC*

### Technology Providers and Other Vendors

Locating prospects for your firm's products can be like finding a needle in a haystack. MarketPlaceWeb tracks over 200 data points on each investment manager, enabling you to pinpoint your marketing programs to truly qualified prospects.

To find out how MarketPlaceWeb can enhance your business, visit [www.marketplaceweb.com](http://www.marketplaceweb.com) or call 800-333-6357, x748 to schedule a meeting with one of our sales executives.



# Data available:

## Plan Sponsors ▶

With more than 19,000 U.S. public and private pension and endowment funds with assets over \$10 million, the plan sponsor database includes 11,000 corporate funds, 4,700 endowments and foundations, 1,600 multi-employer funds (unions), 1,000 hospital funds, and 850 public funds. MarketPlaceWeb delivers summary information, asset size, current allocation, manager and consultant relationships and key professionals with contact information.

Company Name	Type	Assets (\$mil)	City	St/Prov.
<input type="checkbox"/> Oil Boots of the USA	Corporate Plan Sponsor	\$500.50	New York	NY
<input type="checkbox"/> Sargent & Lundy	Corporate Plan Sponsor	\$500.70	Chicago	IL
<input type="checkbox"/> Detroit Diesel Corporation	Corporate Plan Sponsor	\$501.00	Detroit	MI
<input type="checkbox"/> Del Monte Foods	Corporate Plan Sponsor	\$504.00	San Francisco	CA
<input type="checkbox"/> The Stroh Brewery Company	Corporate Plan Sponsor	\$514.00	Detroit	MI
<input type="checkbox"/> Hallmark International, Inc.	Corporate Plan Sponsor	\$514.70	Chicago	IL
<input type="checkbox"/> Starwood Hotels & Resorts Worldwide	Corporate Plan Sponsor	\$525.00	White Plains	NY
<input type="checkbox"/> Kaman Aerospace	Corporate Plan Sponsor	\$535.00	Bloomfield	CT
<input type="checkbox"/> Oakwood Healthcare, Inc.	Hospital Plan/Fund Sponsor	\$535.30	Dearborn	MI
<input type="checkbox"/> Home Savings of America	Corporate Plan Sponsor	\$536.00	Chattsworth	CA
<input type="checkbox"/> Rawlin, Inc.	Corporate Plan Sponsor	\$537.00	New York	NY
<input type="checkbox"/> Seagate Technology	Corporate Plan Sponsor	\$537.10	Scotts Valley	CA
<input type="checkbox"/> P.H. Gossler Company	Corporate Plan Sponsor	\$539.40	Spring Grove	PA
<input type="checkbox"/> Cleveland Spring Companies	Corporate Plan Sponsor	\$539.50	Stolon	OH
<input type="checkbox"/> County of Santa Clara (CA)	Public Plan Sponsor	\$510.00	San Jose	CA
<input type="checkbox"/> Dairy Farmers of America	Corporate Plan Sponsor	\$510.00	Kansas City	MO

## ◀ Investment Managers

Get information on more than 2,400 of the world's largest institutional money managers, including over 250 real estate investment managers, representing more than 8,400 investment products worldwide. Review data such as assets under management, fees, monthly performance, company overview, investment process, services offered and key professionals with contact information.

**Company Info**  
 State Street Global Advisors  
 One International Place  
 Boston, MA  
 02110-4101  
 Phone: 617 786-3000  
 Fax: 617 664-2950  
 Web address: <http://www.ssga.com>  
 Main email address: [p\\_greg\\_donahue@ssga.com](mailto:p_greg_donahue@ssga.com)

**Key Facts**  
 Assets under management: \$741,154.00 mil  
 Year firm was founded: 1978  
 Firm type: Bank/Trust Co. Affiliate

**Firm Overview**  
 State Street Global Advisors (SSgA) is the investment management division of State Street Bank and Trust Company. State Street Bank and Trust Company, founded in 1792, is a wholly-owned subsidiary of State Street Corporation. State Street Corporation is a publicly traded bank holding company whose shares are traded on the New York Stock Exchange under the symbol "STT." State Street Asset Management division, subsequently referred to as State Street Global Advisors, was established in 1978 as the investment management division of State Street Bank & Trust Company. In 1995, all of State Street's investment related business units were organized under one umbrella, named State Street Global Advisors. Since inception, SSgA's focus has been on providing highly disciplined, risk controlled investment strategies to the global marketplace. SSgA has offices in 28 locations around the world, with on-site portfolio management services in Boston, London, Montreal, Munich, Paris, Hong Kong, Sydney and Tokyo.

**Is the Firm ...**  
 A registered investment advisor? N  
 Exempt from SEC registration? Y  
 In full compliance with AIMR standards? Y

**Company Info**  
 Pacific Corporate Group  
 1200 Prospect Street  
 Suite 200  
 La Jolla, CA  
 92037-3608  
 Phone: 858 456-6000  
 Fax: 858 456-6018  
 Web address: <http://www.pcgfunds.com>

**Key Facts**  
 Firm Type: Independent  
 Year founded: 1979

**Organizational introduction:** Established in 1979, Pacific Corporate Group (PCG) specializes in alternative investment consulting and discretionary management (limited partnerships and direct/co-investments). PCG has extensive experience in providing a full range of services including sourcing, evaluating, structuring, negotiating, and monitoring of alternative investments. PCG manages 14.1 billion in assets as a result of its investment philosophy, high due diligence standards and strong performance track record. PCG derives all of its revenues from these services. PCG has sixteen investment professionals.

**Ownership Information**  
 Percentage owned by employees: 100.0%  
 Is firm women or minority owned: N  
 Percentage owned by women: 0.0%  
 Total women/minority ownership: 0.0%

**Key Executives**  
 Bruce Baker  
 La Jolla, CA  
  
 Christopher J. Bower  
 La Jolla, CA

## Pension Fund Consultants ▶

Keep tabs on approximately 350 top consulting firms with more than 3,500 pension and endowment clients. Firm data includes services provided, client descriptions, manager criteria and fees charged, manager search process, assets under advisement and key professionals with contact information.

# MarketPlaceWeb

helps build your business with:

- Convenient, fast, anywhere-in-the-world web-based access to the entire application and all of your saved research and queries
- Prospects you can download into any contact manager with links to MarketPlaceWeb for updated data
- Current information on key industry players and the relationships among them
- World-class performance analytics from Strategic Financial Solutions
- Data on more than 2,400 investment managers including over 250 real estate managers
- Reports, queries and research that your entire team can view and share
- “Research to go” with portable and customizable PDFs
- Quick, basic and advanced search capabilities
- Hundreds of sorting criteria
- Custom lists and reports based on any database field, that can be downloaded into mailing lists, contact managers, spreadsheets and other applications
- A searchable archive of articles from Investment Management Weekly
- Targeted marketing to 10,000 registered users of World's Best Money Managers, via Manager Spotlights
- Cash flow analysis, market insight and key trend drivers from Industry Insight

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Contact Nelson Information at  
One Gateway Plaza  
Port Chester, NY 10573  
800-333-6357 x 748  
Email: [nelson.sales@tfn.com](mailto:nelson.sales@tfn.com)

[www.marketplaceweb.com](http://www.marketplaceweb.com)