

# CreditSights for Private Wealth Management

Delivering timely and integrated content across the organization. CIOs, research, wealth and relationship managers. CreditSights offers an independent global market view with actionable insights.



## Partnership Model

- **Firm-Wide Support** – leverage analysts' deep sector expertise on more than 1,000 issuers across 35 industries.
- **Expertise** - empower advisors working on bond portfolios, trading opportunities, SMA/mutual fund selection and monitoring concentrated stock positions.



## Market Analysis

- **Fixed Income Outlooks** – analysts calls on near and longer-term outlook, spreads and benchmark rates for informed portfolio management.
- **Municipal Bonds** – coverage of major states, major issuers, prominent trouble spots and valuable strategy insights.



## A Voice You Can Trust

- **Global Team** – we have 100 analysts worldwide more than half of whom have been in the industry for 20+ years and have seen every market cycle.
- **100% Independent** – we do not underwrite securities or manage assets; we support and guide those who do.



## Impact Your Workflow

- **Trading Ideas** – to identify yield generating strategies in any market environment.
- **Deep Dives** – on new issues, initiations and sector trends, we offer your team deep dives they are seldom able to spend time doing themselves.

Local expertise +  
deep sector  
knowledge =  
*intellectual capital  
you can act on.*

100  
ANALYSTS  
GLOBALLY

20  
YEARS OF  
RESEARCH

150K  
ARTICLES  
IN ARCHIVE

14MM  
ARTICLE  
VIEWS

## Our Clients

Our conversations with clients give us a comprehensive view of the market that you won't find anywhere else.



**Top 10 Global  
Pension Managers**  
**Top 10 Mutual  
Fund Families**



**Top 20 Global  
Corporate  
Bond Underwriters**



**Top 10 Largest  
US Asset Managers**

**Top 10 Insurance  
Companies  
(Life and P&C)**



## Access content any time, any where

Our insights are available via a number of delivery methods:

- **CreditSights.com** contains all of our reports, plus access to multimedia content
- Read on our **mobile app** and **Bloomberg**
- Email alerts tailored to specific topics, tickers, and markets
- View our more than 50 outlook **conference presentations** from our global sector and strategy teams
- Host team-wide **quarterly calls** with our analysts
- Listen to our **webinars**, including a Weekly Wrap with our strategists that highlights the big stories and insights from the week, and an interview with a sector-focused analyst (Fridays at 10am EST)
- Access to **training resources** that provide an overview of credit markets and sectors that can help teams get up to speed

NEW YORK - LONDON - SINGAPORE - GLASGOW - DENVER

## About CreditSights

CreditSights empowers nearly 15,000 financial professionals among the world's largest institutions with the credit-risk tools, independent research and comprehensive market insights they need to make well-informed credit-risk decisions. Setting the standard for global credit research since 2000, we provide timely data, news, recommendations and unbiased analysis of the investment-grade and high-yield debt securities of 1,000+ issuers around the world. We deliver this content through innovative platforms, enabling market participants to know more, risk better and ultimately create value.