



Archer's Tax Optimization Solution

Meet the demand for tax smart investing

As investors look to mitigate the impact of taxes on their portfolios, managers are finding new ways to bring tax optimized strategies to market.

Archer can help managers develop and deliver tax optimized solutions with efficiency, flexibility, and scale. Archer's open architecture solution will include the option to leverage the MSCI Barra Open Optimizer using third-party or proprietary factor data to implement tax optimized strategies.

Quickly bring tax optimized strategies to market

An industry leader in delivering personalized solutions, Archer will offer investment managers the ability to deliver tax optimization at scale.

- **Efficiency**

While determining optimal portfolio composition was once a resource-intensive endeavor, this fully automated solution will leverage data and technology to help managers efficiently create customized portfolios.

- **Scalability**

Managers can scale the implementation of tax optimization across accounts, expanding opportunities to deliver customized offerings. The Barra Open Optimizer enables managers to look across a large number of portfolios to determine how to optimize the portfolio and build trades for each account based on the individual holdings and risk tolerances of an investor's portfolio.

- **Flexibility**

Managers will be able to quickly and efficiently optimize strategies across a wide range of constraints to suit their needs and expand distribution. These include industry, sector, country, currency, and transaction cost, as well as multi-period and multi-account optimization and support for active and passive portfolios, multiple currencies, and other alternative assets.

The **MSCI Barra Open Optimizer** is an open, flexible optimization tool designed specifically to help managers implement tax-aware strategies while minimizing variance from other portfolio factors designed to meet unique investment challenges.

MSCI is a leading provider of critical decision support tools and services for the global investment community with over 50 years of expertise in research, data, and technology.

Tax Optimization Capabilities

Archer's tax optimization solution, which will be available in early 2023, will enable investment managers to quickly bring to market the tax efficient strategies their clients are seeking. With this integrated and automated solution, managers will be able to differentiate their offering, provide their clients with a higher level of transparency, and ultimately grow their business.

Managers will be able to leverage MSCI's Barra Open Optimizer, or another third-party or proprietary optimizer and optimize strategies across a wide range of constraints, including:

- ✓ **Industry**
- ✓ **Sector**
- ✓ **Country**
- ✓ **Currency**
- ✓ **Transaction cost**
- ✓ **Multi-period**
- ✓ **Multi-account**
- ✓ **Active or passive portfolios**
- ✓ **Multiple currencies**

Archer's solution will enable investment managers to develop tax-aware solutions for both actively managed and direct indexing accounts at scale while maintaining the integrity of their investment process.

Learn more about our solutions for streamlining operations, launching new products and entering new distribution channels at **archerims.com**