

# ANALYTICS PORTAL ENHANCEMENTS

August 2018

MSCI

# MARKET DATA FILES RESTRUCTURING

## WHAT'S CHANGING?

DATASET / PRODUCT	LAST DATE ADDED	
+ Iris Digest	15 May 2017	RENAME <b>UK IRIS and Lease Events</b>
+ Index Fact Sheet	08 Jun 2017	no change
+ Digest	06 Jun 2017	RENAME <b>Non-Traditional Property Type Indexes</b>
+ Key Centres Report	23 May 2017	no change
+ Fund Intel	23 May 2017	MERGE
+ Multinational Intel	16 May 2017	no change
+ Digest Reference Tables	16 May 2017	RENAME <b>UK Digest Reference Tables</b>
+ City & Sector Intel	16 May 2017	DELETE (folder contains duplicate UK Digest Reference Tables)
+ AP Index File	16 May 2017	MERGE (folder currently hosts UK Index Files only)
+ Fund Digest	07 Jun 2017	RENAME <b>Property Fund Indexes</b>
+ Publication	11 May 2017	MERGE**
+ All Funds: Data File	11 May 2017	MERGE
+ Core Funds: Data File	04 May 2017	MERGE
+ AP Digest Download	17 Feb 2017	MERGE
+ Other	31 Jan 2017	DELETE**
+ Lease Events Review	15 Nov 2016	MERGE
+ Index	16 May 2016	RENAME <b>Headline Indexes</b>
+ Market Size Estimates	09 May 2016	no change

\*\*U.S. Dashboard Manual and U.S. Service Deliverables Guide previously located in the Publications folder will be migrated to the [MSCI Client Support Site](#)

# MARKET DATA FILES RESTRUCTURING

## ADDITIONAL CHANGES

### Files moved

- Transaction Linked Indicators: Moved from Archived Global Intel tab to Market Analysis tab.
- Property Indexes: Files no longer updated have been moved to Archived Global Intel tab (Property Indexes category)

### Files removed

- Multinational Intel: All results by currency files. These files were no longer updated. The results can be queried via the Create Analysis tool.

# MARKET DATA FILES RESTRUCTURING

## END RESULT

My Saved Queries **Market Analysis** Archived Global Intel

DATE UPDATED **ANYTIME** LAST MONTH SINCE LAST LOGIN FREQUENCY Select Frequency  SHOW HISTORIC REPORTS PRODUCT TYPE Select Product

REPORTING PERIOD reporting from reporting to MARKET Select Market ☆ ONLY SHOW FAVORITES

BULK DOWNLOAD Search here Sort by (Date Updated) Group by (Product Type)

+ Index Fact Sheet 45	☆	✉
+ Global Intel Digest Download (xls Timeseries) 59	☆	✉
+ Global Intel Digest Download (xls normalized) 48	☆	✉
+ Global Intel Digest Download (csv normalized) 59	☆	✉
+ Global Intel Digest Download (xls transposed) 57	☆	✉
+ Key Centres Report 7	☆	✉
+ UK IRIS and Lease Events 2	☆	✉
+ Property Fund Indexes 12	☆	✉
+ Multinational Intel 10	☆	✉
+ UK Digest Reference Tables 5	☆	✉
+ Transaction Linked Indicators 3	☆	✉
+ Property Indexes 52	☆	✉
+ Market Size Estimates 2	☆	✉

# HOMEPAGE CHANGES

The homepage has been changed to allow quicker access to the Market Information and Portfolio Analysis sections of the Analytics Portal

The screenshot displays the Analytics Portal homepage with a navigation bar at the top containing 'HOME', 'CREATE ANALYSIS', 'SAVED REPORTS', and 'HELP & SUPPORT'. Below the navigation bar, a welcome message reads 'Welcome, DemoUser PAS'. The main content area is divided into two primary sections: 'MARKET INFORMATION' and 'PORTFOLIO ANALYSIS'. Each section contains three buttons: 'Create a query', 'Open a query', and 'Download a saved file or report'. The 'Other Applications' button is also present in the Portfolio Analysis section. Below these sections, there are three news cards: 'NEWS' (with a pie chart icon), 'MSCI Real Estate News' (with a 'NEW: NOTIFICATION (06 January 2018)' and a reference to 'Release Notes'), 'Research' (with a lightbulb icon), and 'Events' (with a group of people icon). Two callout boxes provide additional information: one lists navigation actions for the buttons, and the other notes that 'Saved Analysis' has been renamed to 'Saved Reports' and that 'Saved results from Create Analysis' are now referred to as '(Saved) Queries'.

HOME CREATE ANALYSIS SAVED REPORTS HELP & SUPPORT

Welcome, DemoUser PAS

## MARKET INFORMATION

Create a query Open a query

Download a saved file or report

## PORTFOLIO ANALYSIS

Create a query Open a query

Download a saved file or report

Other Applications

### NEWS

#### MSCI Real Estate News

NEW: NOTIFICATION (06 January 2018)

Please refer to the [Release Notes](#) to review the following.

### Research

### Events

- Create a query navigates to Create analysis
- Open a query takes the user to their Saved Queries
- Download a report navigates to the Saved Report section
- Other applications contains links to older application like Core Reports and PAS-Port

Note that Saved Analysis has been renamed to Saved Reports. Saved results from Create Analysis are now referred to as (Saved) Queries.

This is following client feedback.

# SAVED REPORTS

The Saved Report section (formerly Saved Analysis) has a new look & feel aligned to other parts of the Analysis Portal.

## Changes:

- The Market Analysis content has been restructured to provide more clarity (also see appendix for more information)
- For PAS the reports have been split between GDS Methodology and Former Methodology. All portfolios which have been migrated onto the new methodology will see their new reports appear in the Reports & Files tab. Any reports and bespoke analysis produced using the former methodologies will continue to be available through the tabs labelled as such.
- Additionally, My Saved Analysis has been renamed to My Saved Queries.
- Switching between Market Information and Portfolio Analysis is now done via the toggle in the top navigation bar.

## New features:

- New filter bar allowing the user to filter the lists of queries and reports by various parameters.
- Sort and group reports by various parameters.
- Ability to mark queries and reports as favorite and filter by this criteria.
- Ability to set up email notifications whenever a new version of a report or new results become available.

More details on the following slides

# SAVED REPORTS – NEW DESIGN

HOME CREATE ANALYSIS **SAVED REPORTS** HELP & SUPPORT

Market Analysis **Portfolio Analysis**

My Saved Queries **Report & Files (Global Methodology)** Report & Files (Former Methodology) Custom Analysis (Former Methodology)

DATE UPDATED: **ANYTIME** LAST MONTH SINCE LAST LOGIN  
 FREQUENCY: Select Frequency  SHOW HISTORIC REPORTS PRODUCT TYPE: Select Product  
 REPORTING PERIOD: reporting from  reporting to   
 MARKET: Select Market  ONLY SHOW FAVORITES PORTFOLIO: Select Portfolio

BULK DOWNLOAD Search here  Sort by (Date Updated) Group by (Portfolio)

+ Executive Summary 10

- Asset Fact Sheet 10

REPORT FORMAT	DATE UPDATED	REPORT	PORTFOLIO NAME	PORTFOLIO DATASET	BENCHMARK DATASET	SERIES COMPUTATION	SEGMENTATION	REPORTING PERIOD	VALUATION FREQUENCY	MARKET	CURRENCY	OPTIONS
	14 Jun 2018	Asset Fact Sheet	Australia Demo Portfolio 1	Australia Demo Portfolio 1 Australia Direct Property [PG_001]	Australia Demo Benchmark Australia Direct Property [PG_001]; Unfrozen	Published Quarterly	Australia - Property Type by Region [SEG_oz5]	Sep 2017	Annual	Australia	AUD	
	21 Apr 2018	Asset Fact Sheet	UK Demo Portfolio 1	UK Demo Portfolio 1 UK Direct Property [PG_001]	UK Quarterly Demo Benchmark UK Direct Property [PG_001]; Unfrozen	Published Quarterly	UK - Property Type by Region [SEG_011]	Sep 2017	Quarterly	UK	GBP	
	21 Apr 2018	Asset Fact Sheet	UK Demo Portfolio 2	UK Demo Portfolio 2 UK Direct Property [PG_001]	UK Quarterly Demo Benchmark UK Direct Property [PG_001]; Unfrozen	Published Quarterly	UK - Property Type by Region [SEG_011]	Sep 2017	Quarterly	UK	GBP	
	21 Apr 2018	Asset Fact Sheet	USA Demo Portfolio 1	USA Demo Portfolio 1 Direct Property Only [PG_801]	US Demo Benchmark Direct Property Only [PG_801]; Unfrozen	Published Quarterly	US - Property Subtype [SEG_u10]	Sep 2017	Quarterly	USA	USD	

# SAVED REPORTS – FILTER BAR

New filter options allowing more control over what is shown on screen.

My Saved Queries:

DATE UPDATED **ANYTIME** LAST MONTH SINCE LAST LOGIN  SHOW MSCI QUERIES ☆ ONLY SHOW FAVORITES

Report tabs:

DATE UPDATED **ANYTIME** LAST MONTH SINCE LAST LOGIN FREQUENCY Select Frequency  SHOW HISTORIC REPORTS PRODUCT TYPE Select Product

REPORTING PERIOD reporting from  reporting to  MARKET Select Market ☆ ONLY SHOW FAVORITES PORTFOLIO Select Portfolio

Description of filters:

- **Date Updated:** Only show queries or reports which were updated since the time chosen in the filter setting.
- **Show MSCI Queries:** Show/Hide queries created by MSCI
- **Only Show Favorites:** Filters on only those files which have been favorited by the users (if any).
- **Reporting Period:** Filter reports on a specific range of reporting periods.
- **Frequency, Market, Product and Portfolio (not shown):** Filter the list of reports by one or more of these criteria.
- **Show Historic Reports:** Also show older versions of reports (based on reporting period). This is switched off by default.

# SAVED REPORTS – GROUPING AND FAVORITES

Group and sort files by various categories:

The screenshot shows the top navigation bar with tabs for 'My Saved Queries', 'Report & Files (Global Methodology)', 'Report & Files (Former Methodology)', and 'Custom Analysis (Former Methodology)'. Below this is a filter bar with sections for 'DATE UPDATED' (ANYTIME, LAST MONTH, SINCE LAST LOGIN), 'FREQUENCY' (Select Frequency), 'SHOW HISTORIC REPORTS' (toggle), 'PRODUCT TYPE' (Select Product), 'REPORTING PERIOD' (reporting from, reporting to), 'MARKET' (Select Market), 'ONLY SHOW FAVORITES' (star icon), and 'PORTFOLIO' (Select Portfolio). A 'BULK DOWNLOAD' button is on the left. On the right, there is a search bar and dropdowns for 'Sort by (Date Updated)' and 'Group by (Product Type)'. Two callout boxes highlight the dropdown menus: the 'Sort by (date updated)' menu shows 'Date Updated', 'Name (A - Z)', and 'Name (Z - A)'; the 'Group by (Product Type)' menu shows 'Product Type', 'Market', 'Frequency', and 'Portfolio'.

Ability to mark files as favorite:

Global Intel Digest Download (xls Timeseries) 59

REPORT FORMAT	DATE UPDATED	REPORT TYPE	REPORT NAME	REPORTING PERIOD	FREQUENCY	MARKET	CURRENCY	OPTIONS
QUERY DATA REPORT	14 Aug 2018	Global Intel Digest Download (xls Timeseries)	Global Intel - Belgium (A)	Dec 2017	Annual	Belgium	EUR	★ ✉
QUERY DATA REPORT	09 Aug 2018	Global Intel Digest Download (xls Timeseries)	Global Intel - Ireland (Q)	Jun 2018	Quarterly	Ireland	EUR	★ ✉
QUERY DATA REPORT	09 Aug 2018	Global Intel Digest Download (xls Timeseries)	Global Intel - Australia (A)	Dec 2017	Annual	Australia	AUD	★ ✉

Individual files can be marked as favorite as well as entire categories.

# SAVED REPORTS – EMAIL NOTIFICATIONS

Users can choose to receive an email notification when a new version of the reports or results become available.

Executive Summary 10

REPORT FORMAT	DATE UPDATED	REPORT	PORTFOLIO NAME	PORTFOLIO DATASET	BENCHMARK DATASET	SERIES COMPUTATION	SEGMENTATION	REPORTING PERIOD	VALUATION FREQUENCY	MARKET	CURRENCY	OPTIONS
	14 Jun 2018	Executive Summary	Australia Demo Portfolio 1	Australia Demo Portfolio 1 Australia Direct Property [PG_001]	Australia Demo Benchmark Australia Direct Property [PG_001]; Unfrozen	Published Quarterly	Australia - Property Type by Region [SEG_oz5]	Sep 2017	Annual	Australia	AUD	
	21 Apr 2018	Executive Summary	UK Demo Portfolio 2	UK Demo Portfolio 2 UK Direct Property [PG_001]	UK Quarterly Demo Benchmark UK Direct Property [PG_001]; Unfrozen	Published Quarterly	UK - Standard PAS Segmentation [SEG_std]	Sep 2017	Quarterly	UK		
	21 Apr 2018	Executive Summary	UK Demo Portfolio 1	UK Demo Portfolio 1 UK Direct Property [PG_001]	UK Quarterly Demo Benchmark UK Direct Property [PG_001]; Unfrozen	Published Quarterly	UK - Standard PAS Segmentation [SEG_std]	Sep 2017	Quarterly	UK		

Frequency

None

Immediate

Daily

Weekly

Email notifications can be set up to be received immediately after the report or results are refreshed.

Alternatively they can be bundled together in daily or weekly digests.

GBP

Frequency

None

Immediate

Daily

Weekly

# SAVED REPORTS – EMAIL NOTIFICATIONS

Clicking on the link in the email will automatically download the file after the user has logged in to the Analytics Portal.

**From:** noreply@msci.com [mailto:noreply@msci.com]  
**Sent:** 25 July 2018 14:26  
**To:** User, Demo <demo.@msci.com>  
**Subject:** MSCI Analytics Portal: New Report version available - Global Intel - Sweden (A)

Dear Demo User,

A new version of the following report is available:

Market Information Reports:					
Report Name	Report Type	Reporting Period	Frequency	Market	Currency
<a href="#">Global Intel - Sweden (A)</a>	Global Intel Digest Download (xls normalized)	Dec 2017	Annual	Sweden	SEK

Click on the report name above to view and download this report. Please note that you will be required to log in with your MSCI login credentials. You can also manage your notification settings on the same screen.

If you forgot your existing MSCI Client Support Site login details, you can click "Forgot Your Password" on the login page.

For any further questions or assistance, please email [realestate@msci.com](mailto:realestate@msci.com) or contact your MSCI representative.

MSCI

# MY SAVED QUERIES

## Additional changes to My Saved Queries tabs

My Saved Queries    Market Analysis    Archived Global Intel

DATE UPDATED    ANYTIME    LAST MONTH    SINCE LAST LOGIN    SHOW MSCI QUERIES    ONLY SHOW FAVORITES

Search here

+ Standard 6

- Plus 4

REPORT FORMAT	DATE UPDATED	NAME	DESCRIPTION	CREATED BY	MODE	OPTIONS
QUERY DATA	13 Aug 2018	PLUS2 -- Searching for yield beyond US gateway markets --	Identify US markets with attractive yields and low risk outside overpriced gateway cities	MSCI (Global Intel)	Plus	☆ ✉ ⋮
QUERY DATA	15 Aug 2018	PLUS5 -- Are value weighted indexes flawed --	-- Studying the impact of high value assets on reported market indexes	MSCI (Global Intel)	Plus	☆ ✉ ⋮
QUERY DATA	13 Aug 2018 ⚠	Test Cross Segmentation Split	Test Cross Segmentation Split	DemoUser PAS	Plus	☆ ✉ ⋮
QUERY DATA	02 May 2018 ⚠	Rolling 5-yr TR for APAC cities	Same Store TR	DemoUser PAS	Plus	☆ ✉ ⋮

Currently showing 4 out of 4 records.

Plus only: Alert message when queries have expired or not yet run.

Delete and Run (Plus only) queries from the options menu

# CREATE ANALYSIS ENHANCEMENTS

The following enhancements have been introduced in the Create Analysis application. Note that these changes affect both Market Information and Portfolio Analysis.

- Query editing: Previously saved queries can now be edited without the need to create a new query.
- The name of the query is now shown in the left hand panel whenever a query is saved or loaded.
- Certain special characters are now allowed in query, segmentation and filter names. Names may now contain:
  - Letters
  - Numbers
  - Whitespace
  - ! @ # \$ % ^ & \* ( ) \_ - [ ]
- The chosen data layout (Normalized, Transposed or Time Series) is now saved together with the query definition.
- The browser scrollbar was previously hiding parts of the Report Panel tab. This tab as well as the left hand Query tab have been made wider to improve the visibility and usability.
- The dataset cards have been simplified to show only relevant information and enable faster screen load times.



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