



FOR IMMEDIATE RELEASE

## MPI Launches Target-date Radar, Transformative Tool for TDF Selection

**SUMMIT, N.J., October, 13, 2016 /PRNewswire/** -- [Markov Processes International \("MPI"\)](#), today announced the release of its newest software application to meet the needs of investment professionals that advise Defined Contribution ("DC") plans – [MPI Target-Date Radar](#). MPI, a FinTech company renowned for its investment research and reporting solutions, has built an interactive search and selection tool designed for fiduciaries seeking to match DC plan demographics, behaviors and preferences with appropriate target-date fund ("TDF") families. This tool employs MPI's hallmarks: insightful quantitative analysis, unique visualization techniques to better contrast products and best-in-class reporting. The MPI TDF analysis process, which was designed to help advisors address [DOL guidelines](#), also includes detailed reporting features for qualitative, quantitative, and suitability comparisons. Target-Date Radar provides plan advisors with an established, repeatable methodology and a documentable process for assessing, selecting and monitoring TDFs. Detailed information on the tool can be found at [www.tdf-radar.com](http://www.tdf-radar.com).

Review a sample report produced with MPI Target-Date Radar - [http://origin-qps.onstreammedia.com/origin/multivu\\_archive/ENR/Sample-MPI-Target-Date-Radar-Report.pdf](http://origin-qps.onstreammedia.com/origin/multivu_archive/ENR/Sample-MPI-Target-Date-Radar-Report.pdf)

MPI's innovative approach to the analysis of TDF glide paths, as well as its unique approach to assessing the needs and preferences of a DC plan, was designed to transform the way that these products are selected, creating a new standard for the industry. By combining holdings-based data with the power of its patented Dynamic Style Analysis ("DSA") modeling, MPI is able to look beyond the "total equity exposure" of the glide path to uncover exposures that manage longevity, volatility, and inflationary risks. This unique approach also allows users of the tool to dial-in their risk management preferences across three critical retirement zones – before, near, and in retirement – to shape their ideal glide path. Additionally, MPI's independent ownership ensures that the Target-Date Radar plan questionnaire and resulting custom TDF product recommendations are based solely on unbiased, objective analysis that matches the attributes of a plan to a subset of the most appropriate TDF families – no specific fund families are given preferential treatment.

"Although there are other TDF decision tools on the market, most of these come from asset management firms or wealth management firms that have an interest in directing plan sponsors to a particular fund family. These tools, not surprisingly, are built to emphasize the ideas that are important to that particular asset manager. As it stands, the market desperately needs unbiased, analytics-based TDF guidance that helps DC plans identify the right products for their participants, as well as why a particular offering might be a poor fit," said [Chas Mansfield, CIO of Compass Financial Partners](#). "MPI's Target-Date Radar incorporates the methods and approach that I have

found to be most effective in working with DC plans. This tool has no hidden agenda, empowering the advisor, the plan and the participants."

MPI's Target-Date Radar application is seamlessly integrated with [MPI's Stylus Web platform](#) – a complete DC reporting and analysis toolkit. [Dennis Baldi, EVP and Head of Advisor Solutions for MPI](#), added, "Most TDF decision tools fall short in their ability to analyze the actual glide path 'shape', which many consider to be the primary driver of long-term investment outcomes. Our Target-Date Radar is able to go beyond the broad strategic glide path view to isolate specific retirement risk considerations that are too often unaddressed."

MPI has been a leading provider of custom plan analysis and reporting solutions to DC-focused firms for over 10 years, and MPI's Target-Date Radar was designed in conjunction with these clients. The product reflects MPI's focus on delivering cutting-edge, institutional analysis in the most accessible and useful manner. [Mike Chidlovsky, EVP and Head of Enterprise Solutions for MPI](#), remarked that, "We always learn from our clients, especially when it comes to workflow and how they interact with their own clients, and they are the ones that encouraged us to build this tool. We work with some of the most [sophisticated firms](#) in the industry and Target-Date Radar was designed to meet their high expectations."

For more information, [contact MPI](#).

#### **About MPI**

[Markov Processes International, Inc. \("MPI"\)](#) is a leading provider of investment research, analysis and reporting solutions to the global wealth and investment management industry. MPI works with over 300 client organizations, including institutional consultants, investment advisors, asset managers, wealth management firms, institutional investors, sovereign wealth funds and family offices. Rooted in the principles of transparency, objectivity and efficiency, MPI takes an innovative approach to problem solving in the areas of fund and portfolio analysis, risk management, asset allocation and reporting to ensure its clients have the tools to succeed in ever-crowded markets.

###