

BNY Mellon Investment Management Launches Portfolio Analysis Service BNY Mellon PinPointSM

Following a successful rollout in the U.S., BNY Mellon PinPointSM analysis will now be offered in the UK and Europe as part of the firm's client experience platform.

London, 26 October 2023 – BNY Mellon Investment Management (“BNY Mellon IM”), one of the world’s largest asset managers with \$1.8 trillion in assets under management¹, today launched BNY Mellon PinPointSM, a model portfolio analysis service for intermediary clients in the UK and Europe.

BNY Mellon PinPointSM provides total portfolio allocation analysis that aims to identify portfolios’ strengths and weaknesses. Insights from the analysis are designed to help advisers make informed investment decisions to build more resilient and refined model portfolios, taking into consideration their clients’ investment objectives, risk appetite and time horizon.

In addition to portfolio allocation analysis, BNY Mellon PinPointSM includes asset class research, risk factor analysis, stress testing based on current market conditions and historical performance data, manager research, objective-based investing, global macro context and market analysis, and tactical insights.

“Markets are more complex than ever and what clients need is greater insight into how their portfolio is constructed and how it would behave in different macro scenarios,” said **Matthew Oomen, Global Head of Distribution at BNY Mellon IM**. “We created BNY Mellon PinPointSM to help advisers position their portfolios for any market environment based on sophisticated risk analytics with a seamless, customisable digital experience. This experience also includes access to the full breadth of services, products and investment capabilities of BNY Mellon, which touches 20% of the world’s investable assets.”

“With BNY Mellon PinPointSM, we’re delivering a client-centric investment solution,” added **Eric Hundahl, Head of Portfolio Strategy at BNY Mellon IM**. “From our initial rollout of the tool in the U.S., the feedback we received was positive – information was easy to digest, and the actionable steps communicated in order to strengthen portfolios were a game changer. We look forward to rolling this out to clients in the UK and Europe.”

For more information on BNY Mellon PinPointSM, visit <https://www.bnymellonim.com/uk/en/intermediary/bnym-pinpoint.html>

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About BNY Mellon Investment Management

BNY Mellon Investment Management is one of the world’s largest asset managers, with \$1.8 trillion in assets under management as of Sept 30, 2023. Through an investor-first approach, BNY Mellon Investment Management brings to clients the best of both worlds: specialist expertise from seven investment firms offering solutions across every major asset class, backed by the strength, stability, and global presence of BNY Mellon. Additional information on BNY Mellon Investment Management is available on www.bnymellonim.com.

BNY Mellon Investment Management is a division of BNY Mellon. Established in 1784, BNY Mellon is America’s oldest bank and the first company listed on the New York Stock Exchange (NYSE: BK). Today, BNY Mellon powers capital markets around the world through comprehensive solutions that help clients manage and service their financial assets throughout the investment life cycle. BNY Mellon had \$45.7 trillion in assets under custody and/or administration and \$1.8 trillion in assets under management as of Sept. 30, 2023. BNY Mellon has been named among Fortune’s World’s

¹ AUM as of 30 June 2023.

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