



# SOLVE Relative Value Analysis™ for Portfolio Managers

Cohort-based. Configurable. Actionable.

SOLVE is redefining relative value analysis for fixed income portfolio managers with new cohort-based analytics that turn a manual spreadsheet exercise into a real-time, configurable, and actionable decision engine. By helping PMs evaluate value across sectors, ratings, structures, and maturity buckets, SOLVE makes allocation decisions clearer, faster, and easier to defend.

## How SOLVE Redefines Relative Value Analysis:

### Bond vs. Bond

Foundational relative value view for evaluating specific trade ideas.

### Bond vs. Cohort

Evaluate a bond against a dynamically generated peer group with similar characteristics.

### Cohort vs. Cohort

Compare one market segment against another to identify where value may be building.

These enhancements help PMs evaluate opportunity across cohorts and sectors more efficiently, explain decisions more clearly, and support capital allocation with a more consistent analytical framework.

## Why It Matters

- Better portfolio-level decisions across sectors and market segments
- Stronger internal justification for committees, stakeholders, and investment teams
- Reduced reliance on spreadsheets and other manual processes
- A more repeatable, defensible allocation framework
- Greater clarity in volatile markets when comparing where value may be building

## Use Cases

- Compare sector vs. sector and cohort vs. cohort opportunities
- Evaluate potential portfolio over- or under-allocation
- Support allocation shifts and rotation decisions
- Align investment decisions with internal guidelines and constraints
- Assess whether a bond, sleeve, or segment looks attractive relative to relevant peers

## The Power Behind the Analytics

SOLVE Quotes™

**30M+**

Unique Daily Quotes

SOLVE Px™ | Corporate Bonds

**250,000+**

Recent Coverage and  
AI Predictive Trade Prices

SOLVE Px™ | Municipal Bonds

**1.1M+**

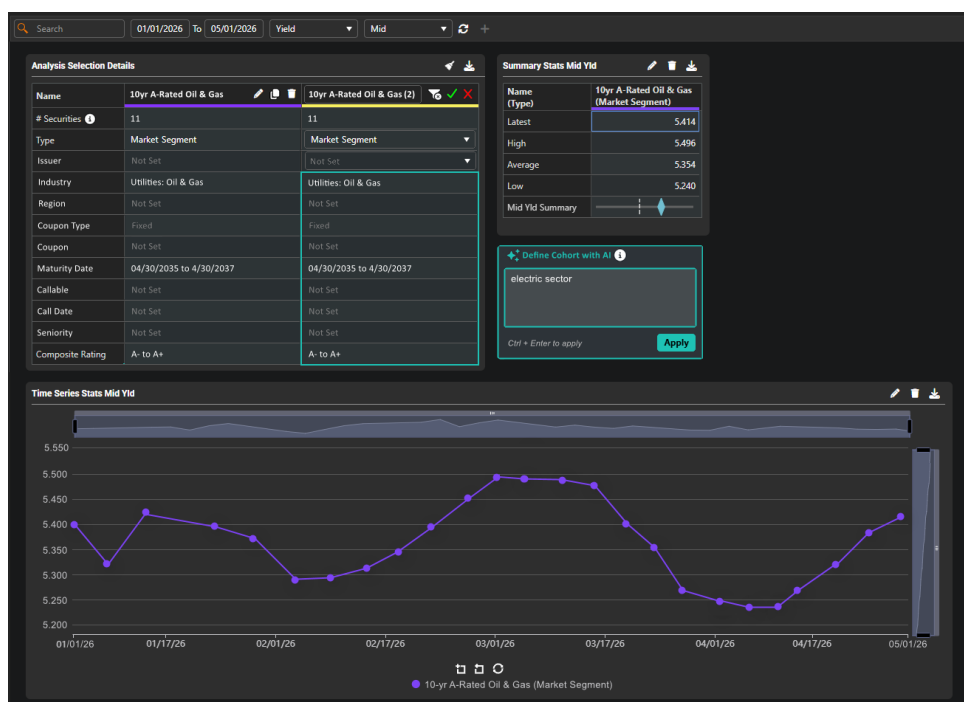
Recent Coverage and  
AI Predictive Trade Prices

These analytics are more actionable because they combine SOLVE Px, our real-time predictive pricing, with SOLVE Quotes, our pre-trade market data. While many tools can indicate whether something looks rich or cheap in theory, this approach helps portfolio managers evaluate relative value in the context of current market signals and make more informed capital allocation decisions.

**SOLVE Quotes:** Delivers structured pre-trade market intelligence that helps PMs evaluate whether a segment is merely attractive in theory or presenting a real opportunity for repositioning.

**SOLVE Px:** Delivers AI predictive pricing for a more current and consistent analytical foundation for comparing bonds, cohorts, and market segments.

## A New Framework For Relative Value Analysis



Compare sectors, cohorts, and portfolio exposures through a more configurable relative value framework designed to support allocation and rotation decisions.

**Flexible, streamlined delivery via:**

**SOLVE Quotes Web App**  
**FTP   FIX   API**

## SOLVE Relative Value Analysis for Portfolio Managers

A real-time decision framework for fixed income relative value, powered by SOLVE Quotes and SOLVE Px.



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 VALUE ANALYSIS**

