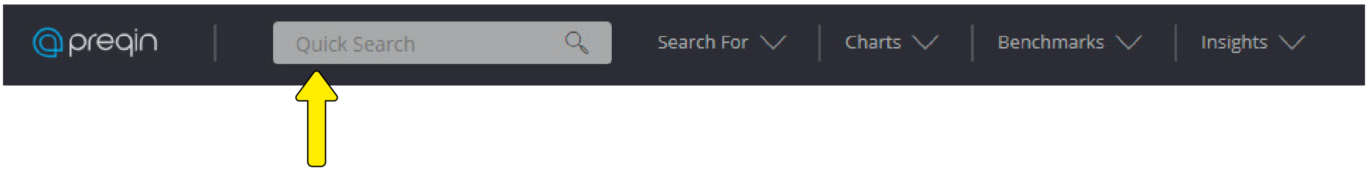
Frequently Asked Questions
Preqin Pro
2019

Contents

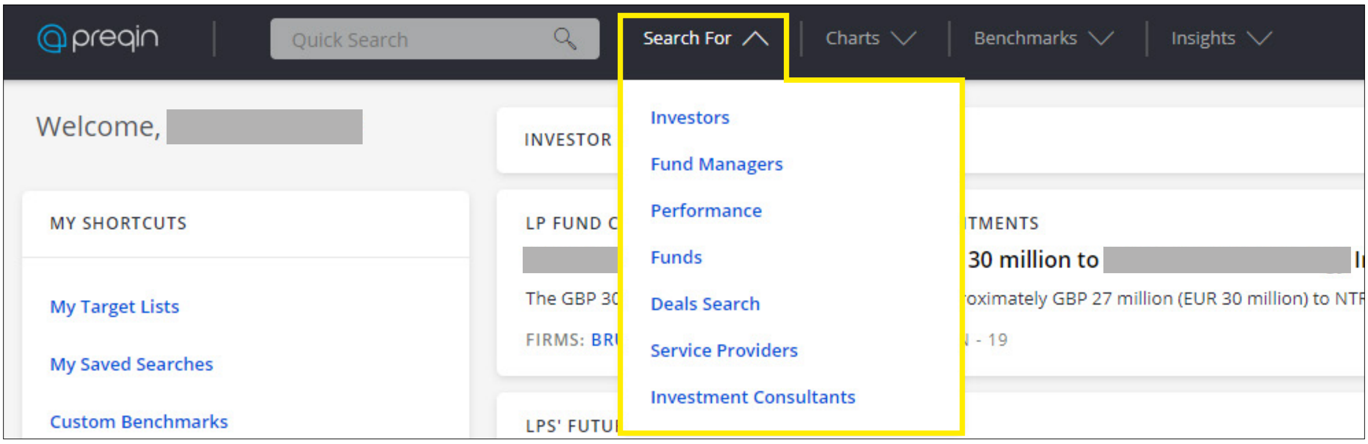
Searching on Preqin Pro

Q1: How can I find a specific investor/fund manager/service provider?
If you know the name (even if it's not their exact name) use the 'Quick Search' tool, available in the top navigation bar.



Start typing in the box and results will start populating. Once you've found the result you're looking for, simply click on it to access a detailed profile.

Q2: How can I validate many investors/fund managers/service providers at the same time rather than just looking at profiles?
Use the 'Search For' function from the top navigation bar.



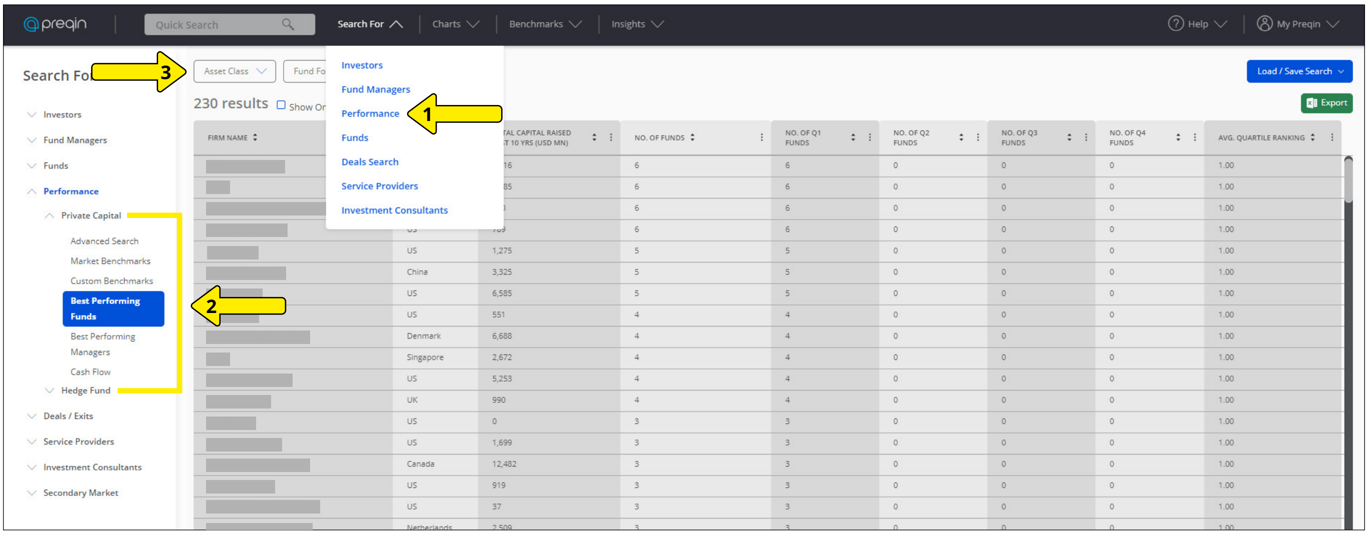
From the dropdown menu, select from investors, fund managers, all funds, funds with performance, service providers or investment consultants.

Once you've made a choice narrow down your targets using a range of filters (such as strategy, geography and vintage) available above the results table.

Q3: How can I find top performing funds?

Preqin Pro has league tables of funds, based off a reported net IRR. To access:

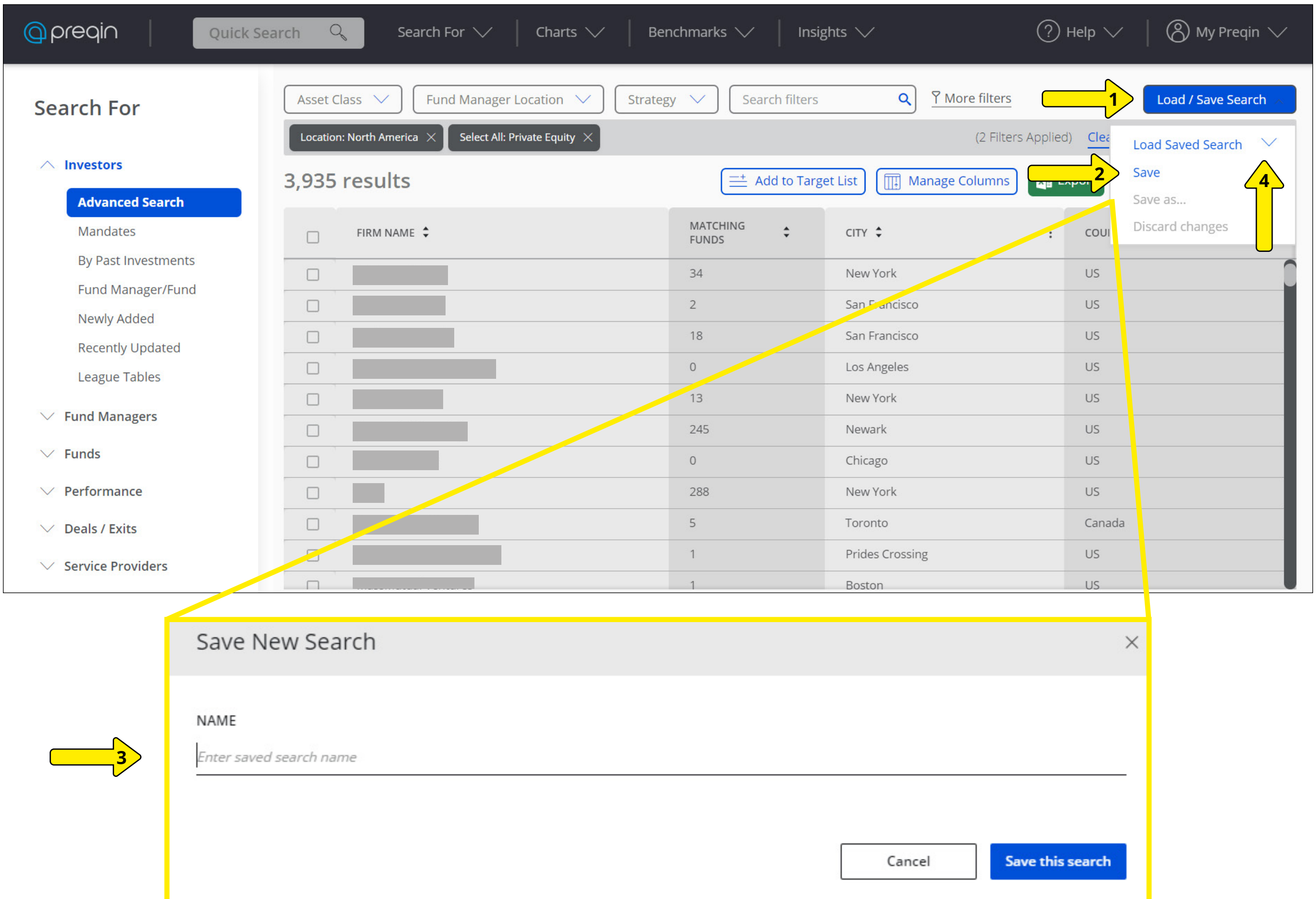
1. Click ‘Search For > Performance’ in the top navigation bar
2. On the left-hand side select ‘Private Capital’ or ‘Hedge Funds’ > ‘Best Performing Funds’
3. Use the filters to find the appropriate comparable



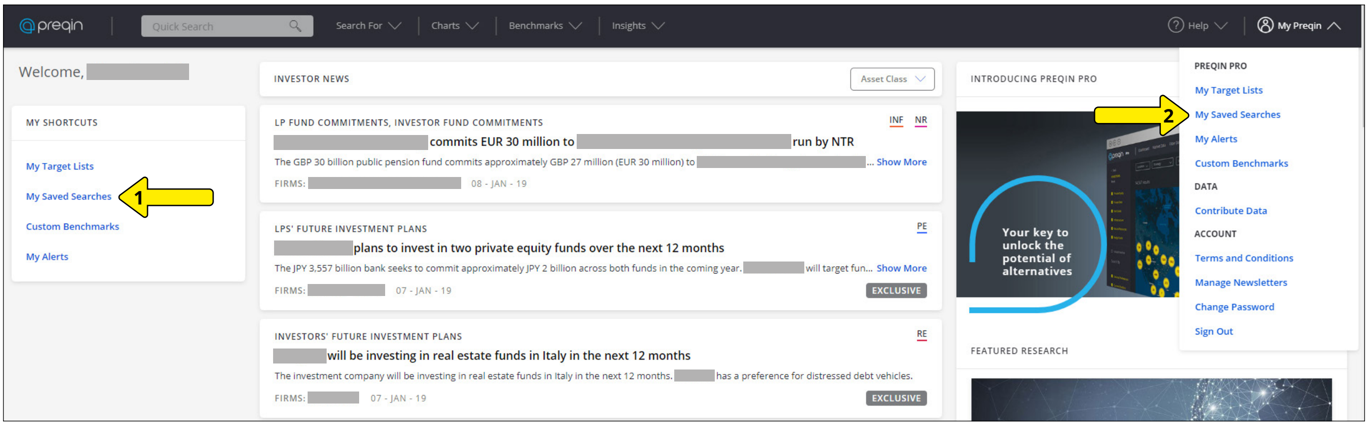
Q4: I want to save a search so I can pick it up later – how can I do this?

To save a search, open a search and select some filters, then:

1. Click the blue ‘Load/Save Search’ button at the top right of the results table
2. From the dropdown select ‘Save’
3. Enter a name for your search in the dialog box that appears.
4. To reload criteria click the blue ‘Load/Save Search’ button and choose your search from ‘Load Saved Search’ drop-down.



To retrieve a saved search outside the Search For page, navigate to ‘My Saved Searches’ from:
1. Your shortcuts menu on the dashboard
2. ‘My Preqin’ dropdown in the top navigation bar



Click the name of the search to be taken back to the results. Note – the results may change over time as new data is entered and reviewed by our researchers. To keep a static list of your search you will need to export your results using the Excel button above the results table.

Lists and Alerts

Q1: What is the difference between Target Lists, Saved Searches and Alerts?
Target Lists: allow you to quickly view and keep track of investors/funds/fund managers of interest without having to search for each one individually every time you use Preqin Pro. Target Lists can be configured to deliver notifications direct to your inbox whenever there is a profile update or news update to an entity on your list.

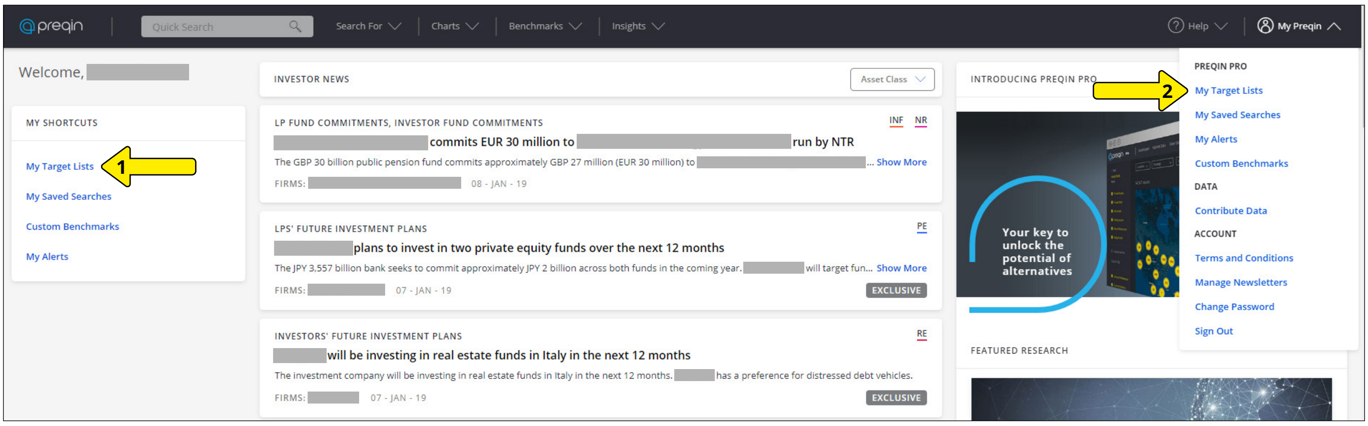
Alerts: can be set up to send notifications direct to your inbox for news on institutional investor activity including commitments mandates and people moves or fund managers that are raising or closing vehicles.

Saved Searches: let you follow a market of interest by allowing you quick access to investors/ funds/fund managers that are included within a criteria-based search that you wish to frequently refer to.

Q2: How do I set up a target list?
To set up/add to a list with entities matching specific criteria:
1. Using 'Search For', choose an area of interest and set up criteria
2. Select the entities you want to add to a list by using the checkboxes next to each result or use the check box on the top right of the results to select all in the search
3. Click the 'Add to Target List' button
4. In the dialog box, choose whether you want to add the entities to an existing list or create a new list. To create a new list, click the plus icon, enter a unique name and click 'Create and Add'. To add to an existing list, find the name of the list in the dialog box and then click 'Add to Target List' button that appears alongside.

To set up/add to a list with specific entities:
1. Using 'Quick Search', type the name of the entity you are looking for and click to enter the profile
2. Click the 'Add to Target List' icon
3. In the dialog box, choose whether you want to add the entity to an existing list or create a new list. To create a new list, click the plus icon, enter a unique name and click 'Create and Add'. To add to an existing list, find the name of the list in the dialog box and then click 'Add to Target List' button that appears alongside.

To manage a list, navigate to 'My Target Lists' from:
1. Your shortcuts menu on the dashboard
2. 'My Preqin' dropdown in the top navigation bar



From here, you can:

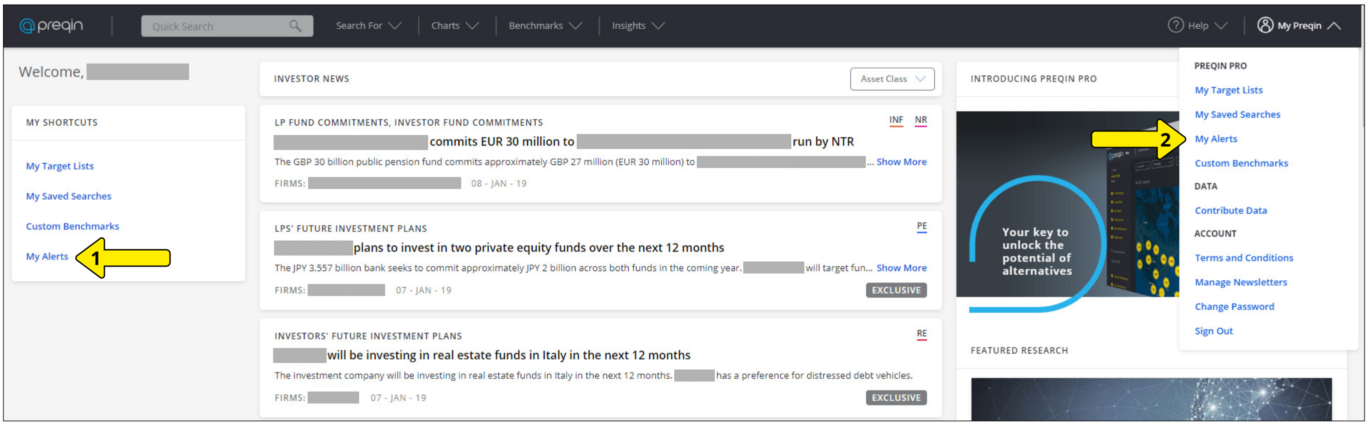
- Click the name of the list to see details on its constituents, remove any profiles, pull in more detailed information using 'Manage Columns' or export the list into excel
- Use the settings wheel to turn email notifications on or off, change notification preferences and manage the frequency of alerts
- Delete a list

Q3: How do I set up news alerts?

News alerts can be set up in the 'My Alerts' section and currently serve news on fundraising or institutional investors.

Navigate to 'My Alerts' from:

1. Your shortcuts menu on the dashboard
2. 'My Preqin' dropdown in the top navigation bar

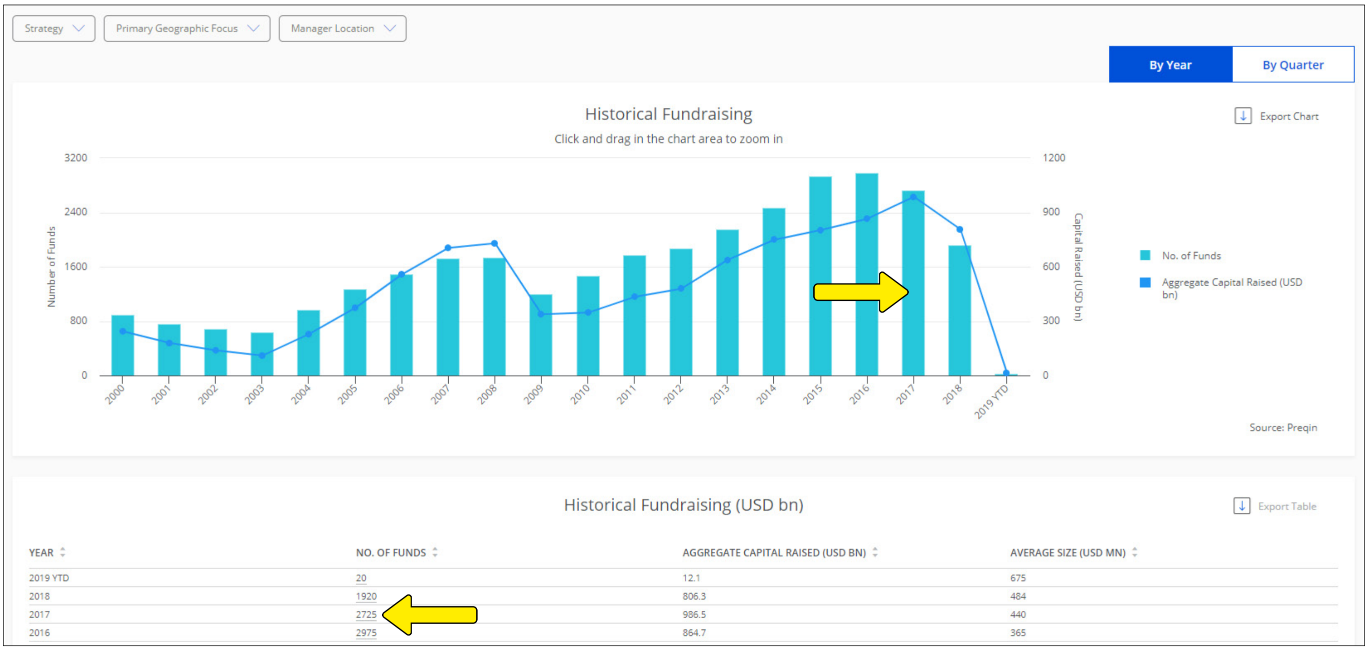


From 'My alerts':

1. Click 'Create a New Notification' button in the top right of the table (either news alert for investors or fundraising alert for fund news)
2. Enter a name for the alert
3. Choose the asset class(es) you want to follow, the frequency of the alert and the type of news
4. Add restrictive criteria to the alert – for example restricting to a specific type of funds or investors or restricting to a specific geography.

Charts & Benchmarks

Q1: How can I see the data behind Preqin charts?
Click on a data point in the chart or click on an underlined number in the data table below to be taken to a 'Search For' page with the criteria for that data point applied.



For charts used in publications – data tables can be found in an accompanying data pack, with underlying data generally available by contacting a member of our client services team.

Q2: Can I use Preqin data/charts in my reports/presentations?
You are welcome to export our data or charts and use them in your reports and presentations as long as these are clearly sourced or referenced. Export a chart or table using the export icon located in the top right corner of a chart.

Q3: How can I compare my fund performance to my peers?
Depending on your area of focus, navigate to either 'Private Capital Benchmarks' or 'Hedge Fund Benchmarks' within the 'Benchmarks' dropdown on the top navigation bar.

From here, you can view top-level statistics for a specific benchmark, filter to specific strategies, geographic preferences, vintages or view benchmark data at various dates in the past. You can also bring in public market equivalents for a proxy of private capital performance to the public markets.

If you want to view specific information on underlying funds in each benchmark, click the name of the benchmark.

If none of the industry benchmarks are suitable you can create your own using 'Search For' > 'Perfomance' or by removing funds in an industry benchmark.

Q4: Which public market index should I use to compare against private capital?
PME metrics benchmark the performance of a fund, or a group of funds, against an appropriate public market (total return) index while accounting for the timing of fund cash flows.

To ensure we offer meaningful values based on a significant dataset, the latest PME values are limited to a six-month lag. Typically, the following are commonly used for comparison:

- **Buyout:** S&P 500, Russell 3000
- **Distressed PE:** Russell 3000
- **Real Estate:** MSCI US REIT
- **Emerging Markets PE funds:** MSCI Emerging Markets
- **All:** MSCI World
- **Venture Capital:** Russell 2000
- **Fund of Funds:** Russell 3000
- **Europe-focused PE funds:** MSCI Europe
- **All Private Equity:** S&P 500

Q5: How can I assign quartile rankings to a fund in a custom benchmark?
Currently Preqin Pro does not calculate quartile rankings automatically for a custom benchmark. Please contact our Client Services team who will assist in these calculations.

Insights

Q1: I have purchased a digital publication. Where can I view this?
If you have purchased a digital copy of a report, you will be able to access it on the day of purchase, unless it was a pre-order. You can access all your purchased publications from 'Insights' dropdown menu on the top navigation. If you have paid for a digital report and cannot find it, please get in touch with our Client Services team, who will be able to assist further.

Q2: Where can I find details of conferences and events that Preqin promotes?
View Preqin's conference calendar, as well as decks from presentations Preqin have given, via the 'Insights' dropdown menu and selecting 'Conferences & Events'.

Alternatively access **Insights** from www.preqin.com/insights.

Q3: I want to update a Preqin graph. How can I do this?
Our data is always evolving as we add new data to the platform daily. If you're viewing an old report, go to 'Insights' in the top navigation bar of Preqin Pro and choose 'Research' to see if there has been an update. Alternatively, you can likely update the graph within Preqin Pro. Almost all the graphs in our reports are driven from our platform. A member of our Client Services team will be happy to walk you through the steps of how to put a dataset together.

Data

Q1: I have a private capital performance query methodology. Where can I find the information?
A comprehensive look at our methodology is available via the 'Performance Data Guide'.

Q2: I would like to contribute data for my firm. How can I do this and is there a cost?
Contributing data is welcome and free of charge. You are able to do this by registering for access to our Data Collection Service.

If you are an investor, please contact our Client Services team. They will connect you with a member of our Research team.

Q3: I cannot find a particular feature on Preqin Pro that I previously used. How do I access that feature?
Throughout the beta release of Preqin Pro we will continue to add existing features and data sets available in Preqin 'Classic' as well as brand-new features. If you can't locate a specific feature, you can still access the original Preqin site via the 'My Preqin' dropdown in the top-right corner of Preqin Pro, clicking on the yellow bar at the top of Preqin Pro or contact a member of our Client Services team.

General Preqin FAQs

Q1: What does Preqin do?
Preqin is the home of alternatives, providing comprehensive data, solutions and insights to alternative asset professionals globally. We provide in-depth data and research to support our global client base in their daily activities including fundraising, investor relations, asset allocation, fund manager selection and business development.

In addition to actionable data, insights and intelligence, we offer market-leading portfolio management software that enables private capital managers to create value through more efficient portfolio management.

Q2: What products do Preqin offer?
Preqin currently offers three products that serve alternative asset professionals. Preqin Pro - our data platform, Preqin Solutions - our portfolio monitoring product, and Preqin Insights - our research and events offering. Learn more about our products and services here or contact us at info@preqin.com for more information or demonstration.

Q3: How does Preqin collect and validate its data?
We collect our data through a variety of sources. Since 2003, we have built valued relationships with fund managers, institutional investors and other industry professionals who are happy to provide us with data on their activities. We also obtain our data via various FOIA requests, public filings and industry-recognized news sources.

During validation, we cross check data to ensure accuracy and also clarify data points directly with whomever they concern.

Q4: How are you addressing GDPR?
We have revised our Privacy Policy and Terms & Conditions to meet the legal requirements and subject rights of GDPR. For any enquiries regarding GDPR please contact dp@preqin.com.

Q5: I see a 'high usage' captcha page whenever I open a link. Why does this happen and how can I fix it?
This alert appears when you open multiple hyperlinks on the platform in a short space of time (around 40 links within a minute). This is to protect our data from mining software. If this gets triggered, please get in touch with our Client Services team.

Q6: I would like to purchase an additional module on Preqin Pro. How can I do this?
If there is an additional data set, module or asset class you would like to subscribe to, please contact your account manager who will be able to provide more detail on pricing. Alternatively, contact our Client Services team.

Q7: Are we able to sync Preqin's data with our CRM?
We are able to sync data with many CRM providers. Please view this page or contact your account manager for further information.

Q8: Will Preqin put a data request together for me?
Our Client Services team are here to assist clients when they request an update to a data point or require data for a report. The team will direct clients to where they can find relevant data and, depending on open tickets, may be able to put together qualified requests within a couple of hours. Depending on the complexity, frequency and time taken to put together the request, a bespoke fee may be charged. This will be communicated prior to the data being put together.

Q9: The data you hold on my firm is incorrect/out of date - how can I correct it?
Please contact our Client Services team, either through email, phone or Live Chat any time, Mon-Fri.

Q10: How do I change the email address or password associated with my account?
To change your password, click here. Alternatively, when logged into Preqin Pro, click ‘My Preqin’ to open up the dropdown in the top right of the page and select ‘Change Password’ under ‘Account’.

To change the email address of an account holder you will need to speak to your designated account manager. Please contact them directly, or if you are unsure of who this is email our Client Services team.

Q11: I’ve locked myself out of my account. How do I get access again?
Please contact your designated account manager or speak to one of our Client Services team.