

 **MuniGUARD**<sup>®</sup> Monitor



## **Easy access to critical disclosure information with the industry's leading municipal bond monitoring service.**

*MuniGUARD*® Monitor is a premium portfolio monitoring tool that provides easy access to critical disclosure information including material events, *MuniPOINTS*® Deal Summaries and local news stories – all linked at the CUSIP® and Obligor identification levels.

*MuniGUARD* Monitor is specifically designed with portfolio risk management in mind. Dealers, Portfolio Managers, Research Analysts, Margin Departments all share something in common. They need to have a broad understanding of their municipal holdings with respect to ongoing disclosure and forces that may affect the performance of a bond – all generally reported in the local daily news. User defined historical look back with the ability to filter through the industry's richest archive makes *MuniGUARD* Monitor the most powerful tool of its kind.

### **Key benefits of *MuniGUARD* Monitor:**

- **Portfolio based surveillance of municipal holdings or watch lists increases the ability to monitor larger data sets.**
- **Timeline based data return with access to deal summaries, disclosure documents and news provides a chronological view of activity for a particular CUSIP, Obligor or Issuer.**
- **Email alerts keeps you updated on the most recent activity within your portfolios and links directly to the changes you care about.**

## Features of *MuniGUARD* Monitor:

- Create portfolios by CUSIP, Obligor or Issuer. Use the import functionality to upload large CUSIP holdings files.
- Monitor changes to your portfolios in an easy to use dashboard.
- Quickly access new and historical *MuniPOINTS*<sup>®</sup> Deal Summaries, disclosure documents and relevant local news stories.
- Setup intra-day or end-of-day email alerts to keep up to date on recent changes to your portfolios.
- Track new material event filings on all your muni CUSIPs.
- Research new trade opportunities.
- Eliminate time-intensive internet searches.
- Supplement your risk evaluation.
- Gain valuable insights not readily available anywhere else.

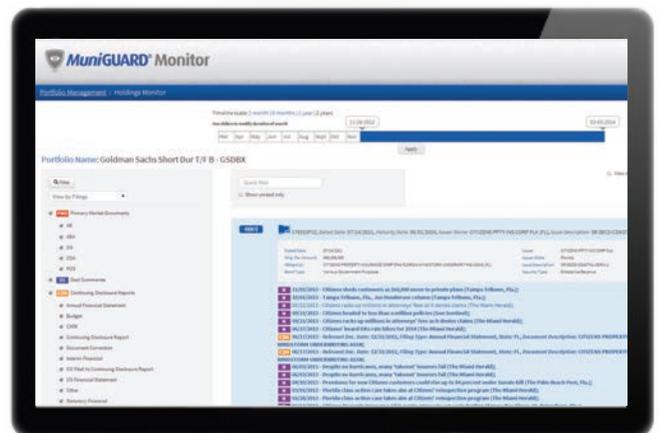
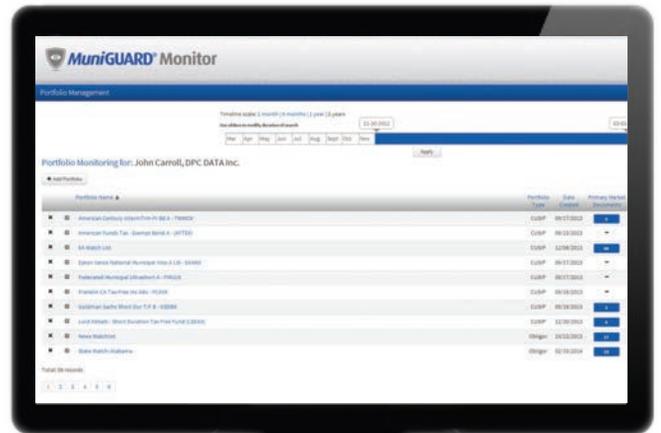
## Best Practice Solution to Address Credit Risk & Suitability for Dealers & Portfolio Managers.

With the continued regulatory focus on disclosure and suitability, DPC's services have become best practice solutions for large, regional and online dealers who offer municipal bonds to their clients.

Dealers and Portfolio Managers that manage municipal portfolios gain a competitive advantage by using *MuniGUARD* Monitor to track news and disclosure filings, enhancing risk monitoring capabilities for the firm. Daily alerts powered by *MuniGUARD* News provide access to regional and local news content that may be considered "material information" by regulators due to its potential impact on credit risk.

The service helps maintain suitability and fiduciary standards for bonds in a portfolio and can improve investor relations as well.

**For more information and sample reports, contact us to set up a demonstration at 800-996-4747 or [sales@dpcdata.com](mailto:sales@dpcdata.com).**





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**DPCDATA**<sup>®</sup>  
Municipal Disclosure Data | Solutions

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