PRIVATE EQUITY

Bloomberg provides a suite of tools designed specifically for the private equity community. This new functionality, combined with high quality data, creates a powerful platform for monitoring, sourcing, due diligence, portfolio monitoring and fundraising activities.

HOW CAN BLOOMBERG HELP YOU?

Market Monitoring
Keep up-to-date with recent transactions, industry trends and breaking news specific to your investment universe. View private equity activity across various asset classes and easily monitor the news on your portfolio or the entire industry.

Idea Generation & Due Diligence
Screen for public and private companies, review financials, customize comparables, learn about management and understand industry trends. For more color, leverage proprietary Bloomberg Intelligence research as well as broker research.

Fundraising
Use Bloomberg’s fundraising database to research recent activity and aid in fundraising discussions. Explore profiles of General Partners, their Funds, and Limited Partners to gain insight and engage in more productive conversations.

Benchmarking
Compare private equity fund performance based on individual fund characteristics, such as net Internal Rate of Return (IRR) and multiple of invested capital, within the context of funds from the same vintage year, strategy, region and/or sector.

Private Placement Memorandum
Privately manage Private Placement Memorandum (PPM) on Bloomberg, to compare management fees across similar funds, calculate custom benchmarks and see deal-by-deal performance metrics.

Public Market Equivalent
Leverage the Bloomberg Public Market Equivalent (PME) model to benchmark your private equity portfolio. Bloomberg provides the leading PME methodologies and index information to quickly calculate PMEs.

PRIVATE EQUITY OVERVIEW

PE <GO> — Private Equity Overview
PE <GO> provides a starting point for accessing the private equity functions and data available on the Bloomberg Professional service. Quickly find GPs, new Funds and LPs using our smart search, access the latest weekly PE newsletter or use the links on the left to navigate the suite of functionality.
PEM <GO> – Private Equity Market Portal
PEM <GO> showcases the most dynamic information in the industry and allows you to monitor the most recent news, view current M&A/equity offerings and see a summary snapshot of fundraising activity. Use the filters at the top of the page to focus on the regions and/or industries you care about most.

PEFR <GO> – Private Equity Fundraising
Bloomberg provides a broad view of the fundraising environment, helping LPs connect with GPs to pursue productive conversations. Gain insight into fundraising Funds, historical GP performance, upcoming Funds and recent LP commitments.
PEBM <GO> – Private Equity Returns Analysis
Measure and compare performance metrics (i.e. IRR, MOIC, DPI) of private equity funds, across strategies, sub-strategies, regions and vintage years. Analyze which General Partners manage funds that consistently perform in the top quartiles, with complete transparency to underlying fund details.

PUBLIC MARKET EQUIVALENT BY BLOOMBERG
The Bloomberg Public Market Equivalent (PME) Model is a tool to benchmark private equity investments. The model helps answer the questions “What would my return have been if I invested the same cash in the public market?” The model can be downloaded from Bloomberg’s Excel Template Library by XLTP <GO> by searching “PME”.

![BENCHMARKING chart](image)

![PUBLIC MARKET EQUIVALENT BY BLOOMBERG chart](image)
PRIVATE PLACEMENT MEMORANDUM MANAGER

PPM <GO> is a document management system providing a secure ecosystem for each Limited Partner to manage Private Placement Memorandum (PPM). LPs can organize, compare management fees across similar funds, calculate custom benchmarks and see deal-by-deal performance metrics.

Any PPM uploaded to Bloomberg will be accessible and visible only by your authorized personnel you enable at your Firm. The document and data cannot be shared outside your Bloomberg account. Once the document is uploaded, you will be able to view the original document in PPM<GO>, the date of the upload and the status of the document. Upon completion, you will be able to enable users within your Firm that require access to the document.
Generate a PPM summary using the PPM Report tool to see all the key fund investment terms, GP investment characteristics, prior fund performance and portfolio company information in one place.
GENERAL PARTNERS

General Partner Search – PEGP <GO>

Search for General Partners based on name, assets under management (AUM), office location(s), and/or characteristics of the funds they manage. PEGP allows Limited Partners to plan roadshows effectively and complements the General Partner due diligence process.

General Partner Profiles

General Partner Description pages give you a rundown of the firm’s funds, portfolio companies, and the LPs invested in each of their funds. You can view a GP’s portfolio company exposure by region and industry, and drill-down into each portfolio company’s transaction details. (e.g. source documents, transaction multiples, stake sought, bonds/loans issued).
**PE Fund Profiles**

Fund Description pages include performance returns (IRRs) and multiples (MOIC, DPI, RVPI), vintage year, fund type, fund strategy, recent transaction activity and management profiles. Additionally, you can view individual LP commitments to the fund, analyze portfolio holdings and quickly identify and benchmark against peer funds.

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**PE Fund Search – PEFS <GO>**

Private Equity Fund Search enables you to identify new investment opportunities and analyze the characteristics of individual funds. Search for Private Equity funds by name, strategy, status, vintage year, industry, region, size and return (IRR). You can expand into each fund for details on the management company, fund performance, underlying investors, and investments.

Bonus: Edit Columns allows you to add additional fund attributes to further filter results.
Limited Partner Search – PELP <GO>
Identify potential investors and track the activities of individual LPs. Search by location, assets under management (AUM), allocation to alternatives, fund mandates, consultants, funds or firms they have invested in and LP type (e.g. Public Pension, Endowment, Foundation, etc). Click through to a Limited Partner’s Description page to see specific commitment sizes, allocations to various funds, full financials and underlying portfolio exposure across regions and sectors.

Limited Partner Profiles
Limited Partner Description pages give an overview of various investors’ assets, actual allocation breakdown vs target allocation across asset classes, as well as a comprehensive list of fund commitments. The ability to see all underlying portfolio companies across an LP’s commitments allows for complete transparency and portfolio monitoring.
Mergers & Acquisitions
Database Search – MA PE <GO>
Use the Mergers and Acquisitions database for market intelligence on acquisitions, divestitures, and joint venture deals globally. The advanced search allows users to find the most relevant deals based on date, location, sector, deal type, deal size and a range of other criteria. Analyze the Time Series tab to find deal activity trends over time, and Buyer List to find the most active and strategic financial buyers.

Alternative Investor Search – MNDS <GO>
Limited Bloomberg’s mandates database helps align asset managers with investors, creating a more efficient investment community. Clients can now find open investment mandates based on sector focus, manager AUM, region, prior track record requirements as well as several other factors.
Bloomberg Intelligence – BI <GO>
Bloomberg Intelligence is a group of 200+ analysts who provide in-depth analysis, commentary, and datasets on industries, companies, and influential factors such as credit, government, litigation and legislation that impact decision-making. Coverage spans over 130 industries and 4,000 companies across the United States, Europe, Asia, the Middle East and Africa. Bloomberg Intelligence is an exclusive service provided to clients who subscribe to the Bloomberg Professional service and can be accessed at BI <GO>.

Third Party Research – RES <GO>
Bloomberg Research is your gateway to research from over 2,500 providers, including brokers, independent providers, market research firms, industry associations and numerous additional third-party contributors. Easily customize settings to suit your needs or utilize the aggregated view to quickly access the research that is important to you. The new research function brings the most important data to the forefront of your screen, including ratings changes, initiating coverage reports, earnings estimate revisions and the latest economic views.
The Bloomberg Professional service goes beyond traditional news sources, offering exclusive and actionable coverage by more than 2,300 experienced journalists globally, along with access to over 125,000 trusted third-party sources. Build custom alerts, translate stories instantly into over 40 languages, see relevant social media activity, and get deeper insight, faster. All on one integrated platform.

PE Newsletter – BRIEF PEF <GO>
Subscribe to Bloomberg’s weekly Private Equity newsletter. Each week stay up-to-date with fund launches, recent closes, LP commitments, LP investment committee minutes, new fund mandates, and exclusive interviews with top Private Equity managers and LPs. The PE newsletter is globally focused, discussing events affecting the entire PE community.
ABOUT THE BLOOMBERG PROFESSIONAL SERVICE

The founding vision in 1982 was to create an information services, news and media company that provides business and financial professionals with the tools and data they need on a single, all-inclusive platform. The success of Bloomberg is due to the constant innovation of our products, unrivalled dedication to customer service and the unique way in which we constantly adapt to an ever-changing marketplace. The Bloomberg Professional service is a powerful and flexible tool for financial professionals—whatever their needs—in cash and derivatives markets as diverse as equities, currencies, commodities, money markets, government and municipal securities, mortgages, indices, insurance and legal information. The Bloomberg Professional service seamlessly integrates the very best in real-time data, news and analytics.

In addition, Bloomberg users benefit from on-demand multimedia content, extensive electronic trading capabilities and a superior communications platform. Bloomberg customers include influential decision makers in finance, business and government. Business and financial professionals recognize the Bloomberg Professional service as the definitive tool for achieving their goals because it offers unparalleled assistance and functionality on a single platform for a single price.
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