

The background is a dark teal color with several large, semi-transparent geometric shapes. On the left, there are several overlapping triangles and quadrilaterals in shades of blue and teal. On the right, there is a large, thick, dark grey circular arc that is partially cut off at the top and bottom edges.

PIMCO:

Personalized Data Driven Decisions

XCENTIUM

PIMCO

About the Engagement:

Build a best-in-class financial website with a Sitecore mobile-first design, with centralized content management and workflows. Personalize experiences based on user interaction, define and build architecture for seamless smooth rollouts to global regions, create streamline systems for processing and delivering large amounts of data quickly to deliver world class communication.

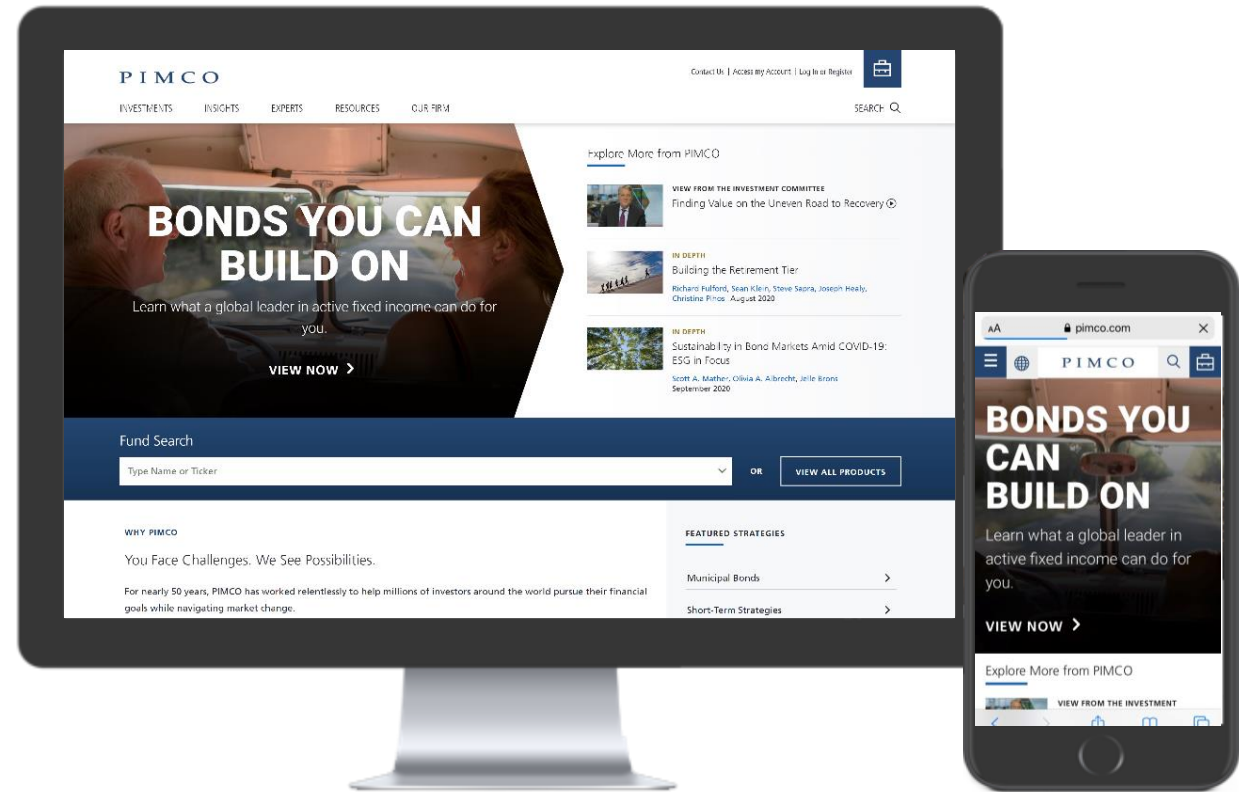
Key Outcomes:

600 FUNDS AGGREGATED IN UNDER 200 MS

20+ INTEGRATIONS

#3 RANKED THIRD OUT OF 300 IN DIGITAL COMMUNICATION AMONG ASSET MANAGERS

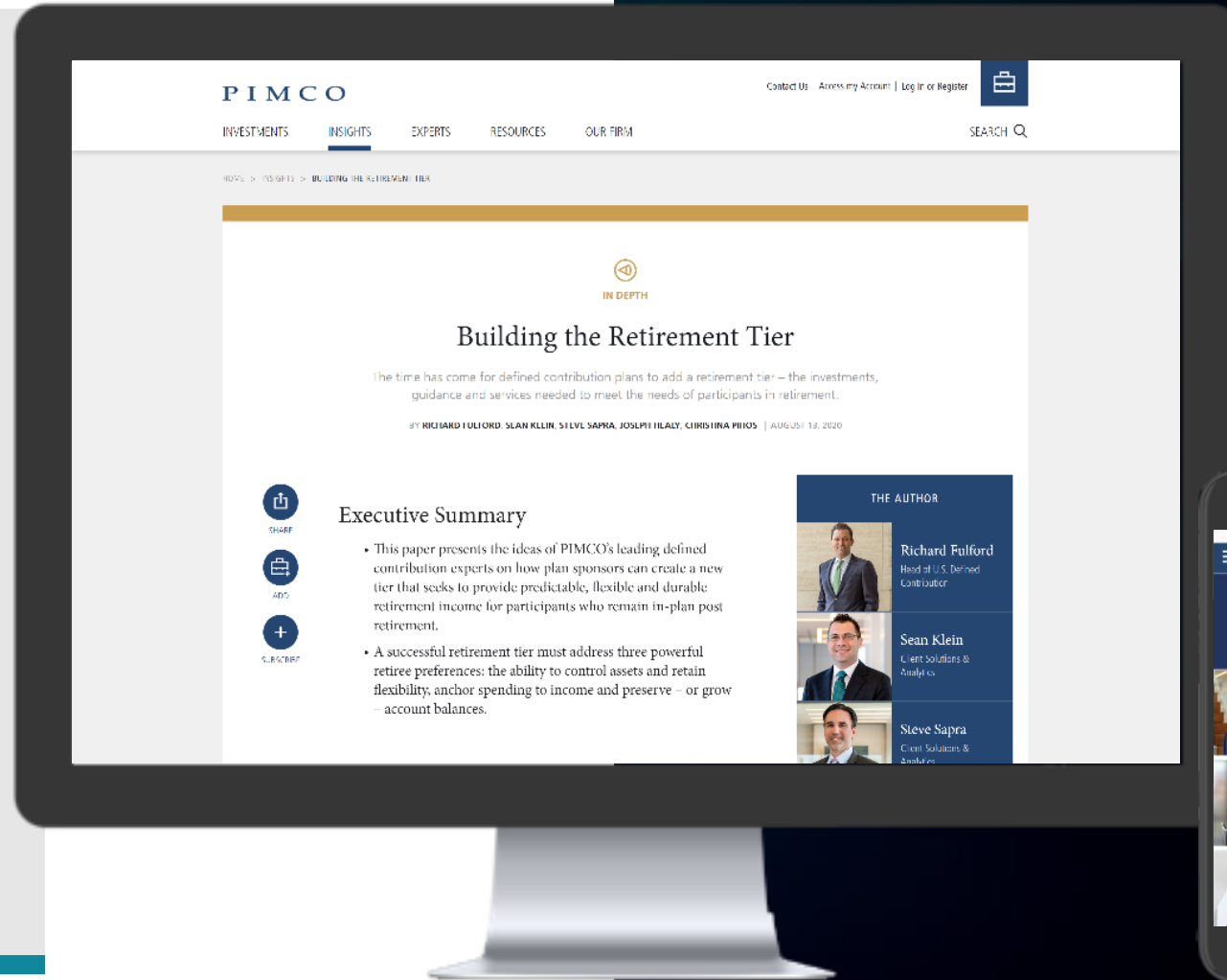
Our Mission: To deliver a **legendary personalized experience** worthy of the PIMCO brand name



PIMCO (Pacific Investment Management Company, LLC) is a global investment management firm focusing on active fixed income management. PIMCO manages investments and develops solutions across the full spectrum of asset classes, strategies and vehicles including fixed income, equities, commodities, asset allocation, ETFs, hedge funds, and private equity.

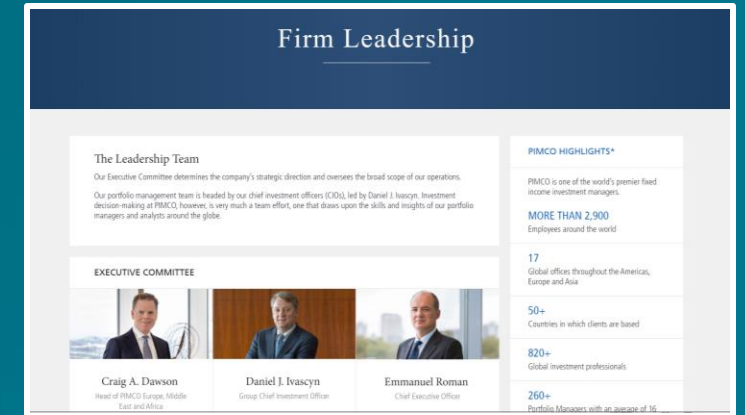
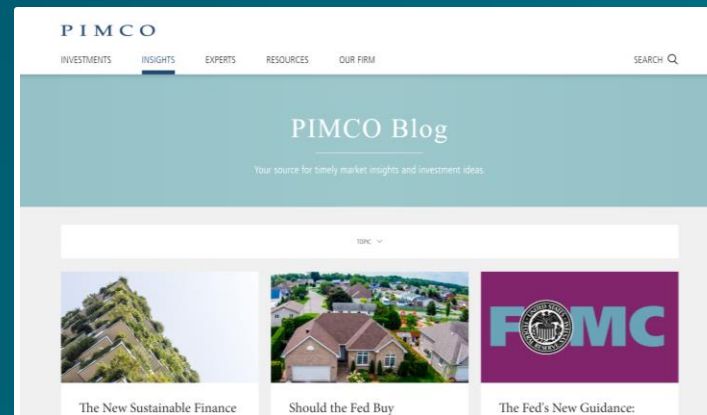
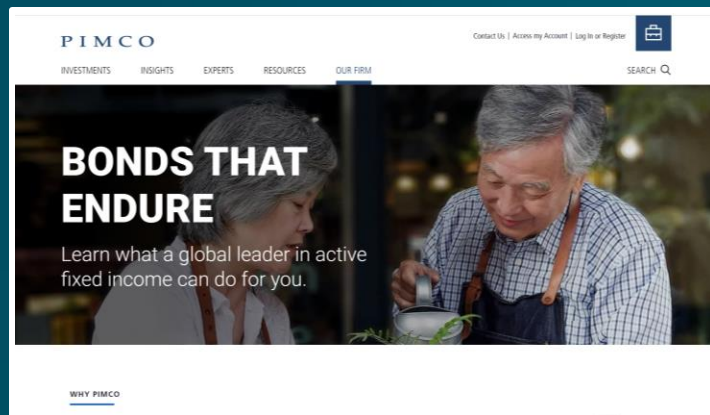
PIMCO: Scope of Work

- ✓ Build a **best-in-class financial website** with Sitecore
- ✓ Mobile first design
- ✓ Centralized content management and workflows
- ✓ **Personalized experiences based on user interaction**
- ✓ Define and build architecture for seamless smooth rollouts to global regions
- ✓ Create streamlined and performant systems for **processing and delivering large amounts of data quickly**



PIMCO: Project Highlights

- ✓ Co-development effort with PIMCO developers XCentium architecting and providing lead developers
- ✓ Collaboration with design agency: AKQA
- ✓ Personalization Heavy
- ✓ Integration Heavy
- ✓ One of the first major Sitecore sites to go live on Sitecore 8
- ✓ Large infrastructure - private cloud
- ✓ The design is a mobile first implementation focusing on quick and user-friendly mobile device usage
- ✓ Responsive design was used through out the implementation
- ✓ The site allows users to set preferences for browsing and the site remembers these preferences for later use



Integrating PIMCO's Data

- ✓ One of the largest challenges in the project was collecting all the data from the downstream PIMCO data systems.
- ✓ PIMCO serves up data for roughly 600 Funds and their share classes. Many of these funds have separate underlying data repositories that must be cohesively connected on the website in a multi-device friendly interface.
- ✓ A challenge was to serve up this data in < 200ms for entire funds pages with changing data. This goal has been met by XCentium developers.
- ✓ Custom implementation of High-charts was implemented to dynamically present performance data on all device types.
- ✓ A state of the art compliance solution was built using Sitecore's rules engine to serve legal disclosure information as well as custom footnotes
- ✓ The solution is focus around easy of use for the editorial staff maintaining the highly complex pages.

The screenshot displays the 'Fund Finder' interface. At the top, there are navigation links for 'HOME' and 'FUND'. Below this is a search bar with the text 'Search by Ticker, Fund Name, Manager Name, Symbol or CUSIP'. A 'FILTERS' section includes a 'RESET ALL' button and several filter categories: 'FEATURED FUNDS', 'SOLUTIONS', 'ASSET CLASS', 'PRODUCTS / SHARE CLASS', 'MORNINGSTAR RATING', and 'FUND MANAGER'. The 'SOLUTIONS' section is highlighted and contains a 'RESET' button and a list of solution categories: 'ACCESS TO GLOBAL MARKETS', 'CAPITAL APPRECIATION', 'CAPITAL PRESERVATION', 'CASH MANAGEMENT', 'INCOME', 'INFLATION PROTECTION', 'MANAGED ASSET ALLOCATION', 'RETIREMENT', and 'TAX EFFICIENCY'. Below this is a table of fund performance data. The table has columns for 'Investment Vehicle', 'Add To My Content', 'Fund Name', 'Symbol', 'Share Class', 'One Day Return (%) as of 03/24/2015', 'YTD', '1YR', '3YR', '5YR', '10YR', 'Since Inception', and 'Fund Manager'. The table lists several funds, including 'PIMCO EqS Emerging Markets Fund', 'PIMCO Fundamental Advantage Absolute Return Strategy Fund', 'PIMCO Fundamental IndexPLUS AR Fund', 'PIMCO Low Duration Fund III', 'PIMCO Low Duration Fund II', and 'PIMCO Low-Term Credit Bond Fund'.

| Investment Vehicle | Add To My Content | Fund Name | Symbol | Share Class | One Day Return (%) as of 03/24/2015 | YTD | 1YR | 3YR | 5YR | 10YR | Since Inception | Fund Manager |
|--------------------|-------------------|--|--------|-------------|--|-------|-------|-------|-------|------|---------------------------|---|
| MF | | EQUITIES, EMERGING MARKETS-EQUITY PIMCO EqS Emerging Markets Fund | PEOWX | INST | 0.03 | 2.35 | 7.52 | -0.83 | - | - | -3.03 as of 03/22/2011 | Virginie Mazonneuve |
| MF | | EQUITIES, MIXED-ASSET, ALTERNATIVES PIMCO Fundamental Advantage Absolute Return Strategy Fund | PFATX | INST | 0.00 | -1.24 | -2.11 | 3.73 | 3.60 | - | 5.49 as of 02/28/2008 | Mohsen Fahmi Sudh Manappa Robert Arnott |
| MF | | EQUITIES, US EQUITY PIMCO Fundamental IndexPLUS AR Fund | PXITX | INST | -0.04 | 0.74 | 11.23 | 19.75 | 18.86 | - | 12.24 as of 06/30/2005 | Mohsen Fahmi Sudh Manappa Robert Arnott |
| MF | | FIXED INCOME, SHORT TERM PIMCO Low Duration Fund III | PLDX | INST | 0.00 | 0.72 | 1.45 | 2.59 | 2.74 | 3.77 | 4.40 as of 12/31/1996 | Scott A. Mather Jerome M. Schneider |
| MF | | FIXED INCOME, SHORT TERM PIMCO Low Duration Fund II | PLDTX | INST | 0.00 | 0.27 | 0.65 | 1.44 | 2.00 | 3.36 | 4.60 as of 10/31/1991 | Scott A. Mather Jerome M. Schneider |
| MF | | FIXED INCOME, INVESTMENT GRADE PIMCO Low-Term Credit Bond Fund | PTCX | INST | 0.00 | 4.90 | 16.56 | 10.70 | 12.42 | - | 14.44 as of 03/17/2009 | Mark R. Kiesel |

PIMCO: A Great Search Experience

The screenshot displays a search interface for 'growth fund' with 4395 results. The main results area shows a list of articles, including 'CYCLICAL OUTLOOK' and 'Outlook for Asia: Growth in China and Japan'. A sidebar menu on the left provides navigation options: Products (High Yield Fund, All Asset All Authority Fund, Diversified Income Fund), Insights (Liquid Alternatives: Considerations for Portfolio Implementation), Experts (Justin Blesy, Ashish Tiwari, Andrew R. Jessop), and Resources (Where can I find income that will grow with my needs?, Guided Fund Finder Section, Mutual Fund Literature, Mutual Funds). A 'SEE ALL' link is at the bottom of the sidebar. The main results area includes a search bar, a filter dropdown set to 'TYPE: ALL', and a list of results with titles, authors, and dates.

PIMCO: How Do We Build a Great Search Experience?

- ✓ Simple, clean and welcoming interface
- ✓ Content-specific result designs
- ✓ Predictive search
- ✓ Suggestive search
- ✓ Faceted search
- ✓ Personalization
- ✓ Spellcheck
- ✓ Search result boosting
- ✓ Analytics