Barclay DataFinder Help

To Search for Hedge Fund Profiles by Strategy:

1. From the main DataFinder page, click the red "Hedge Fund Search" button. The "Basic Search" tab is selected.
2. If you want to search on all strategies the funds use, instead of just the primary strategy, uncheck the "Only search primary strategy" box.
3. In the "Select Investment(s) Strategy" area, select the investment strategies that interest you by clicking to check the boxes. The more investment strategies you choose, the more results you will get. For example, if you checked "Fixed Income: Arbitrage" and you also checked "Sector: Finance," you will find all the funds that meet either criteria ("or"). To see a description of a strategy, click the red question mark.
4. Look above the "Basic Search" tab to see how many funds were found. A summary of your search also appears here.
5. Click the red "Search" button at the bottom of the page.
   A list of Hedge Fund Profiles appears. The list is sorted alphabetically ascending by "Fund," as indicted by the double red arrows. To re-sort, click any column heading that is underlined.
6. Click any fund name to see its Hedge Fund Profile, which outlines trading strategies and performance data, and includes instructions for purchasing the complete three-page profile. You can plot a VAMI chart that compares the fund's performance against the S&P 500, NASDAQ, the Barclay Hedge Fund Index or the Barclay CTA Index for a 1, 3, or 5 year time period. To return to your list, click "Results" near the top of the page, or click the "Back" button in your browser.
7. If you want to add a fund to your Quicklist, click the "[+]" next to the fund name. A small "Quicklist" window pops up. From the Quicklist, you can use the Portfolio Calculator to analyze the performance of a portfolio, or select funds to correlate against a fund or a benchmark.
8. To return to your list of results, click "Results" near the top of the page.

To Search for CTA Profiles by Strategy:

1. From the main DataFinder page, click the red "CTA Search" button.
2. Make sure the "Basic Search" tab is selected.
3. In the "Select Investment(s) Strategy" area, select the investment strategies that interest you by clicking to check the boxes. To see a description of a strategy, click the red question mark.
4. In the "Search Criteria" section near the bottom of the page, "Display ANY managers that meet ANY properties entered above" (which results in a longer list, "A or B") is automatically selected. If you want a smaller list ("A and B"), choose "Display ONLY Managers that meet ALL properties entered above."
5. Look above the "Basic Search" tab to see how many programs were found. A summary of your search also appears here.
6. Click the red "Search" button at the bottom of the page.
   A list of CTA Profiles appears. The list is sorted alphabetically ascending by "Program," as indicted by the double red arrows. To re-sort, click any column heading that is underlined.
7. Click any program name to see its CTA Profile, which outlines trading strategies and performance data, and includes instructions for purchasing the complete three-page profile. To return to your list, click "Results" near the top of the page, or click the "Back" button in your browser.
8. If you want to put a program in your Quicklist, click the "[+]" next to the program name. From the Results page, click the red "View Quicklist" button and a small "Quicklist" window pops up. On the Quicklist, you can select programs to correlate against a program or a benchmark, or use the Portfolio Calculator to analyze the

performance of a portfolio.

9. To return to your list of results, click "Results" near the top of the page.
