

## **DAILYVEST SOFTWARE DELIVERS ADVANCED PERFORMANCE CAPABILITIES**

*Investment personalization software vendor now providing more detailed personalized views for retail investors and plan participants.*

TUCSON, ARIZONA – December 12, 2003 – dailyVest, the leading provider of investment personalization and performance measurement technology for account access websites and statements, today unveiled new software enhancements designed to allow individuals to view investment performance at the Class, Subclass and CUSIP levels.

Peter McNellis, dailyVest's Executive Vice President stated, "Our clients tell us that their customers are becoming more demanding in how they analyze their investments. Delivering detailed personal performance at various levels and views is a smart way to meet investor's expectations. McNellis added, "Savvy investors also like to compare their personal performance to that of a specific industry benchmark. That capability has been rolled-out as well."

In addition dailyVest's software products for retirement plan service providers have been enhanced. Now, plan participants may analyze their personal performance at the "source" level. The new capabilities allow for separate, single performance views into employee contributions, employer match and rollover sources. "Product development this past year, based on market feedback, has been focused on adding flexibility in investor views, both at the 60,000 foot and ground level."

The new enhancements affect dailyVest's *Investment Personalization Platform* software which operates behind the firewall of an account access website. It is designed specifically to provide personal performance illustrations and other critical investment data about all levels of investment holdings.

### **About dailyVest**

Founded in 2001, dailyVest is a software technology firm focused on helping financial institutions leverage their investor's account history through the use of powerful tools for displaying performance measurement and investment personalization on their own account access websites. Today, dailyVest's investment personalization technologies provide nearly a million investors with the big picture, not just account balances. For more information, visit dailyVest at [www.dailyvest.com](http://www.dailyvest.com).

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