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**Asset International Agrees to Acquire Strategic Insight,  
Research Provider to Mutual Fund, Retirement Income and Wealth Management  
Industries Worldwide**

NEW YORK, July 28, 2009 - Asset International, Inc. ("AI") has agreed to acquire Strategic Insight ("SI"), a research and technology firm serving the investment management industry. SI will join Asset International's other prominent industry brands, including PLANSPONSOR, PLANADVISER, Global Custodian, ai5000, and The Trade.

New York-based Strategic Insight provides competitive research and business intelligence to more than 200 financial services organizations worldwide, across the mutual fund, retirement income and wealth management industries. SI clients oversee nearly 90% of the US mutual fund industry's \$11 trillion of assets and also include more than 60 of the world's largest fund managers outside the US.

Asset International CEO Jim Casella will become the new CEO of Strategic Insight, succeeding SI's pioneering founder, Joel Rosenthal, 70, who has announced his retirement.

Casella commented, "Our team at Asset International and our partners from the private equity firm Austin Ventures see many opportunities for Strategic Insight to expand its highly-respected services, both independently and in collaboration with other AI business units."

The growth-oriented transaction is expected to result in additive synergies. As an example, Casella anticipates that the combined organization will leverage the retirement-plan expertise of PLANSPONSOR, and the mutual-fund expertise of Strategic Insight, to create value-added retirement-focused services for organizations within the retirement income business.

Avi Nachmany, SI's co-founder and Director of Research added, "I am thrilled to join Jim and the AI team, together with our entire staff. This new partnership and the increased capabilities it brings extend the vision of Joel Rosenthal, my mentor of 23 years, well into the future."

Nachmany noted that SI had been looking for a parent company with a global vision and footprint, and the professional and financial resources to help the firm innovate and expand its services to the investment management industry worldwide. He added, "We carefully searched for a new leader that is committed to maintaining SI's core principles of objectivity, integrity, and passion. Asset International understands that we are driven to help each of our clients succeed and to strengthen the investment management industry overall. As part of AI, we will be even better positioned to support the continued growth of the global mutual fund industry."

Strategic Insight Chief Information Officer Phil Herzog, who has led the firm's technology efforts for 20 years, commented: "SI has repeatedly proven its ability to deliver mission-critical technologies, such as Simfund, our competitive information database at the heart of the \$20-trillion+ global mutual fund industry. These capabilities will benefit from AI resources and the leadership of Jim and his AI colleagues."



Strategic Insight is Asset International's second acquisition within a month. According to Asset International's Casella, "This latest acquisition brings AI significantly closer to creating a next-generation media and knowledge-management company for the global financial industry." Previously, on June 25, AI announced its acquisition of The Trade, a London-based firm that provides institutional investors with news and information focused on buy-side electronic trading.

For Asset International, Wilson, Sonsini, Goodrich & Rosati acted as legal counsel. Asset International did not use a financial advisor. For Strategic Insight, the financial advisor was the Jordan, Edmiston Group and legal counsel was provided by Pillsbury Winthrop Shaw Pittman LLP

### **About Asset International**

Asset International, Inc. is a privately-held publisher and information provider to global pension funds, asset managers, financial advisers, banking service providers, and other financial institutions in the private and public sector. Asset International produces and distributes print and digital publications, conferences, research and data resources via its industry-leading brands PLANSPONSOR, PLANADVISER and Global Custodian. AI also owns The Trade (London), which publishes news and content focused on buy-side electronic trading via its own brand and longstanding custom publishing relationships. AI was acquired in January 2009 by Austin Ventures and has offices in New York, London and Stamford, CT.

### **About Strategic Insight**

Founded in 1986, Strategic Insight (SI) is a leading research and technology firm for the mutual fund, retirement income, and wealth management industries. SI provides clients with in-depth studies, consultation and electronic decision support systems. SI assists more than 200 organizations worldwide, including the largest mutual fund management companies operating globally and the largest insurance companies serving the variable annuity business. For more information, visit [sionline.com](http://sionline.com), [strategicinsightglobal.com](http://strategicinsightglobal.com), and [annuityinsight.com](http://annuityinsight.com).

For further information, please contact Elon Green, Ben-Abraham Associates, 212.867.0131, [elon@benabe.com](mailto:elon@benabe.com) or Avi Nachmany, Strategic Insight, 212-944-4451, [Avi@sionline.com](mailto:Avi@sionline.com)