Quickly and Efficiently Locate Orion Benchmarks Using the Query App

When working with indexes, it's important to select the correct corresponding benchmark for proper setup. In this week's Tech Tip, we're learning about a more effective and faster way to search for benchmarks in Orion. By making use of a specially designed data query in the Query app, we can quickly show every index in a database and find them with a high degree of certainty no matter how much variety is used when referring to it in the broader market.

What?

To make sure you have the correct benchmark for your index, you can use the Available Index data query (2478), which can be found inside the Query app. This query takes a few minutes to run, but it's the most efficient way to search for an index, especially if you're not absolutely certain what the index is named in our system.

You can also run the query in the OrionService (0) database to generate a complete list of ALL available indexes and whether you have access to the benchmark or not. Note: Indexes that show up in OrionService but not in your database may require additional cost or addendums to display.

Why?

Occasionally, you may be looking for an index that you are unable to locate. You may be trying to assign the new benchmark to something in the Benchmark Assignments app, but what you are looking for is not populating in the search

window.

This often happens if you haven't entered the name of the benchmark exactly as it appears in the Orion system, prompting the search criteria you are entering to exclude the results you wish to see. Running query #2478 can be helpful because it allows you to dynamically search the different columns for the pieces of information about the index that you may have.

How?

To successfully use query #2478:

1. Navigate to the Query app.
2. Make sure to run the query in OrionService if you are looking for a complete list of indexes, or in your database if you are looking for a personalized list.
3. Once the query has run, make use of the sorting and filtering rows in the Query app to locate the Index for which you are searching.

For example: The ACWI (or AC World Index) family of benchmarks is an often-requested set. A common mistake when searching for them is to add too much information into the filter row.

Instead of entering "ACWI" into the index filter row, you may try "AC" or "AC Wor". The rest of the information on the query can also be helpful for determining if you have the right index.

Note: There are columns telling us how recently the index in question was updated and how far back its data goes.

But, What if...?

What are your options if Orion doesn't carry the index for which you are searching? Though it is possible to add to our current selection, it is not usually desirable, because there is almost always an added cost for you to do so. Instead, we can support you in creating and maintaining a manual benchmark by using product creation tools and the Blended Benchmarks app.

Need additional help? Feel free to contact the Products and Prices Team at

productsandprices@orionadvisor.com.

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