

# New Products and Features Launching at 2025 Optimal Blue Summit

New Products	Description	Benefits	Key Features	How to Access
<b>Ask Obi</b>	<ul style="list-style-type: none"> <li>Optimal Blue’s premier executive AI assistant.</li> <li>Ask Obi offers interactive dialogue with Optimal Blue data and aggregates information across all Optimal Blue product lines.</li> </ul>	<ul style="list-style-type: none"> <li>Gives executive leaders a way to find and glean value from all the Optimal Blue products they have – quickly.</li> <li>Automatically pulls relevant details and insights based on the questions an executive seeks to answer.</li> <li>Makes it easier to dig deeper into data without requiring staff resources.</li> </ul>	<ul style="list-style-type: none"> <li>Aggregates data across Optimal Blue products automatically and produces.</li> <li>Interact with your Optimal Blue data easily, any time.</li> <li>Past questions are stored in a side bar to return to after initial query.</li> <li>Strong data security and authentication to access.</li> </ul>	<ul style="list-style-type: none"> <li>Beta program details: <ul style="list-style-type: none"> <li>Sign up now</li> <li>Beta kickoff webinar: week of February 10</li> <li>Beta open: February 18 – March 14</li> <li>Production rollout: ETA first week of April</li> </ul> </li> </ul>
<b>CompassEdge Ratesheet Tool</b>	<ul style="list-style-type: none"> <li>Connects front-end pricing (origination) with back-end pricing (secondary) and generates ratesheet pricing with a known margin, accurately.</li> <li>Manages risk at the point of origination through the seamless, end-to-end connection of multiple Optimal Blue products (PPE &amp; Hedging and Trading).</li> </ul>	<ul style="list-style-type: none"> <li>Ensure precision and accuracy.</li> <li>Gives more pricing power to originators.</li> <li>Eliminates manual/complex calculations.</li> <li>Protect proprietary ratesheet processes by creating safety and insurance that isn’t reliant upon personnel.</li> </ul>	<ul style="list-style-type: none"> <li>Incorporate any execution method for front-end pricing including best efforts, agency cash, agency MBS various servicing valuations, and even bulk bid valuations.</li> <li>Audit process is built in – compare ratesheets to see if there are any big changes.</li> <li>Automated rounding.</li> </ul>	<ul style="list-style-type: none"> <li>Beta program details: <ul style="list-style-type: none"> <li>Beta kickoff date: open now</li> <li>Production rollout: ETA week of March 17</li> <li><b>Requirements: Must be existing CompassEdge user</b></li> </ul> </li> </ul>
<b>Originator Assistant</b> <i>within the Optimal Blue PPE</i>	<ul style="list-style-type: none"> <li>Utilizes generative AI to identify alternate loan scenarios that could produce more competitive pricing and offer more options for a borrower.</li> <li>Examines the applicable adjustments and analyzes where small changes could positively impact pricing.</li> </ul>	<ul style="list-style-type: none"> <li>Saves loan officers time and training on what items can and cannot be adjusted.</li> <li>Offers insights to key breakpoints and informs loan officers of those scenarios.</li> </ul>	<ul style="list-style-type: none"> <li>Ability to fetch pricing in a “what if” context, across multiple scenarios without locking.</li> <li>AI tools look at pricing elements behind the scenes so LOs don’t have to spend time understanding the breadth of elements that go into pricing.</li> <li>Automatically runs – no integration or set up.</li> </ul>	<ul style="list-style-type: none"> <li>Beta program details: <ul style="list-style-type: none"> <li>Beta kickoff webinar: week of February 17</li> <li>Beta open: February 24 – March 21</li> <li>Production rollout: ETA first week of April</li> <li><b>Requirements: Must be on or testing new UI</b></li> </ul> </li> </ul>

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<b>Rules Optimizer</b> <i>within the Optimal Blue PPE</i>	<ul style="list-style-type: none"> <li>Allows a lender to create a single rule (e.g., only FICO's greater than 720), and choose which investors that rule applies to.</li> <li>Rules Optimizer allows the lender to choose the rules approach that works for them (1:1 or 1:many).</li> </ul>	<ul style="list-style-type: none"> <li>Save time and repetitive work by allowing one rule to be applied to multiple products and/or investors.</li> <li>Flexibility to choose the rules approach that works for your business.</li> </ul>	<ul style="list-style-type: none"> <li>Change history tracking.</li> <li>Scheduling - Set start and end dates for rules.</li> <li>Group multiple rules together for easier updating (Ex. amortization rules).</li> </ul>	<ul style="list-style-type: none"> <li>Beta program details: <ul style="list-style-type: none"> <li>Beta kickoff webinar: week of March 3</li> <li>Beta open: March 10 – April 7</li> </ul> </li> <li>Production rollout: ETA mid-April</li> </ul>
<b>Solution Center</b> <i>within Comerence</i>	<ul style="list-style-type: none"> <li>Partner marketplace within Comerence.</li> <li>Search to find partners like investors, vendor products like CRMs, marketing automation, etc.</li> <li>Partners can offer purchasing/contracting right through the Solution Center.</li> </ul>	<ul style="list-style-type: none"> <li>Consolidates partners to one interface based on type (CRM, marketing automation, etc.) and reduces integration time by leveraging single sign on (SSO).</li> </ul>	<ul style="list-style-type: none"> <li>Expanded revenue opportunities for investors and partners.</li> <li>Leverage SSO.</li> </ul>	<ul style="list-style-type: none"> <li>Coming soon</li> </ul>
<b>Confirm Assistant</b> <i>within CompassEdge</i>	<ul style="list-style-type: none"> <li>Drag and drop TBA trade confirmation files in CompassEdge and approve without having to manually key in data points.</li> <li>Leverage AI document intelligence.</li> </ul>	<ul style="list-style-type: none"> <li>Time savings and efficiencies gained.</li> <li>Predictable staffing time commitments and ease of flexibility for clients to change service levels without having to change staffing levels.</li> </ul>	<ul style="list-style-type: none"> <li>AI document intelligence reads broker-dealer document formats and parses data points.</li> <li>Automatic rounding and normalizing.</li> </ul>	<ul style="list-style-type: none"> <li>Coming soon</li> </ul>
<b>Mortgage Rate Futures</b>	<ul style="list-style-type: none"> <li>Provides direct exposure to the latest primary mortgage rate available to borrowers. Utilizing the 30-year fixed rate confirming Optimal Blue Mortgage Market Index (OBMMI), it gives a first look at mortgage industry activity that can be utilized in a lender's risk management strategy.</li> </ul>	<ul style="list-style-type: none"> <li>Adds a new hedging tool to traders' existing workflows</li> </ul>	<ul style="list-style-type: none"> <li>Powered by solely Optimal Blue data from core systems.</li> <li>Offers a unique metric to powered by roughly 35% of mortgage lock processing data collected by Optimal Blue.</li> </ul>	<ul style="list-style-type: none"> <li>This feature went live in partnership with CME Group on January 13, 2025.</li> </ul>