

*The way you build a portfolio is special
EDS makes it scalable*

A MODERN PLATFORM FOR FUNDAMENTAL INVESTING

A Portfolio that Represents Your Intelligence & Intent

Based 100% on your intelligence & investment process. Understand strengths and blind spots, pinpoint risk and reward, measure the strength of your inputs & conviction – with EDS your best ideas always make it into the portfolio and are sized correctly.

Configurable dashboards that integrate your inputs from anywhere into a centralized platform create proactive and efficient decision-making and workflows – internal estimates & models, price-targets, voting processes, scenarios, catalysts, rankings, crowding, ESG, factors, external research, alternative data, etc..

Real-time feeds & alerts give you the confidence that your data & intelligence is correct and up-to-date.

Purpose-built analytics measure the accuracy of your inputs, team members, forecasts, estimates & decisions, ensuring the optimal environment to drive continuous improvement and scale at your fund.

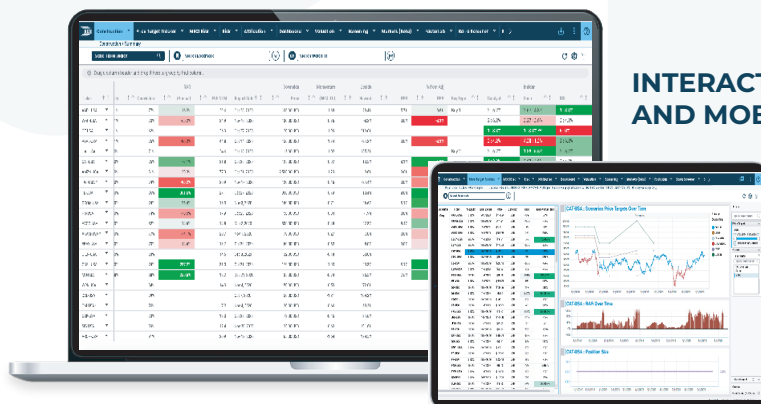


DECISION-SUPPORT THAT ANSWERS THE QUESTIONS THAT MATTER:

- Does higher conviction lead to higher returns.
- Which ideas should we be adding to, or trimming.
- Which analysts are making the best forecasts and how do I create the optimal learning environment.
- Which models & notes, are the most recent or are stale and in need of an update.
- How has our forecasted portfolio return for this year changed.
- Are our internal estimates in front of or behind consensus.
- Should we care more about management quality or the strength of our catalysts.
- Are we paying too much for our alternative data.

QUANTIFY YOUR FUNDAMENTAL INTUITION

Collaborative dashboards that provide actionable insights instantly.



- Surface opportunities more effectively by combining internal & external data in one dashboard. EDS works with all your vendors.
- Analyze your forecast accuracy – measuring targets/estimates vs. forecasts.
- Layer in any data, such as positions, to determine trading timing success.
- Sort to find the best opportunities when up-sizing or downsizing your portfolio.
- Create alerts when position weights or ROI is out of line with your constraints & process.
- EDS works the way you do – easy to use and connects directly to your data (excel, etc.).
- Robust configurability including conditional formatting, customized columns, calculated columns and more, ensure an environment that matches your requirements.
- A dedicated quant team for each account means EDS is always there when you need help.

With the EDS Platform, our deep fundamental process is centralized and measurable – like having our investment team together 24/7, making sure our portfolio always represents our best and highest conviction ideas.

Chief Investment Officer – \$3.5 Billion Fundamental Fund