



RESEARCH MANAGEMENT SYSTEM

*The way you organize your research is special
EDS makes it scalable*

A MODERN PLATFORM FOR FUNDAMENTAL INVESTING

A Research Management System (RMS) Like No Other

Always Up-to-Date and Fully Configurable

The story you document is just as important as the data that supports it. And as a fundamental investor, you take copious notes, every chance you have – analyst calls, earnings calls, management meetings, conferences, etc. You even have a tearsheet that defines your investment thesis and projected risk & returns – and so does your whole team.

However, all this information is disconnected – created in static applications (word, outlook, evernote, excel) & stored in multiple locations – meaning it is not organized on a firm-wide level. Getting the most out of your hard work, is, well, hard work.

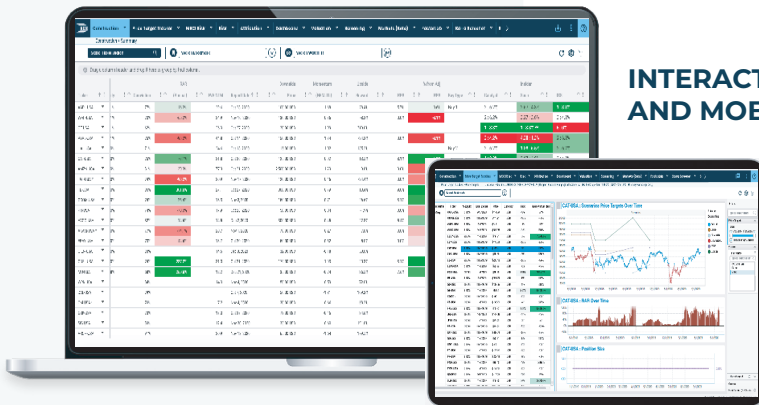
EDS solves this challenge, by bringing your research process and everything that supports it to a centralized and intelligent platform that drives better utilization of your insights, improve collaboration & strong compliance practices.



+1 646-838-4107

sales@equitydatascience.com

www.equitydatascience.com



INTERACTIVE USER PORTAL AND MOBILE APP

A MODERN RESEARCH MANAGEMENT SYSTEM (RMS)

- Bring quantitative (estimates, models, price-targets) and qualitative information together in one platform that works the way you do.
- Robust email, Teams, Slack integration – email in notes, input on an ipad, pull from excel, evernote, outlook, etc.
- Configurable templates, tagging, version control & alerts.
- Streamlined & automated – Connects directly to excel, internal data, or third party applications to ingest and dynamically update fields.
- Always Up-To-Date – updates in real-time from anywhere.
- Best practice compliance.

ANSWER THE QUESTIONS THAT MATTER TO YOU...FAST

- What did management say about margins last year.
- Which ideas meet our objectives & when was our last touch point.
- Which analysts are consistently making the best forecasts and staying up-to date on their names.
- When did we last increase our price target.
- How do we easily communicate with our investors.
- How do we keep our intellectual property safe.
- How do we stay in compliance.

"We are excited about the announcement between two of our trusted partners, Equity Data Science (EDS) and Northern Trust, EDS has helped us build additional insight into our investment process, while we have long valued Northern Trust's support as we grow our business."

CONFIGURABLE TEMPLATES FOR ALL MEMBERS OF YOUR TEAM

Whether it's your investment thesis, pre-earnings, post-earnings, or marketing documents, the EDS template engine makes it easy to create the perfect documents for your team. And because it's in a centralized platform, connected to all your data (models, market data, etc.), it is always up-to-date! Say good bye to old investment docs that are stale.

The screenshot displays the EDS Analytics Platform interface. On the left is a sidebar with navigation links: Change Password, Security, Navigation, Reporting, My Team, Work Log, Portfolio Update, RMS Fields, and RMS Templates. The main area is titled 'Investment Thesis' and features a table of available templates with columns for Field Name, Description, Type, and Options. The templates listed are Milestone, Investment Thesis (highlighted), Marketing, and Events. Below this is a document view for 'AAPL-USA' with a search bar and a history panel on the right. The document content includes a thesis summary, a table of price targets, and a risk-adjusted return calculation. A search notes dialog is open in the foreground.

Investment Thesis

Field Name	Description	Type	Options
Analyst		textarea	
Thesis Summary		textarea	
Next Report Date		textarea	
Last Updated		date	
Conviction		textarea	

Document View: AAPL-USA

Updated By: gmcclall | Updated On: 1/23/2021 20:39

Analyst: Chris

Thesis Summary:

While we understand Apple may not return to the same growth in the iPhone segment, they have evolved into a highly diversified technology company, which revenue and profit derive increasingly from recurring and sustainable sources.

- In the most recent earnings report, the company posted revenue growth of more than 20%, which was partially driven by a 30% increase in iPhone revenue and a 20% increase in services revenue.
- Additionally, they retain a strong balance sheet that supports share buyback and dividend payout. More importantly, price matters. The current share price, standing at \$150, is equivalent to 13 times 2019 earnings expectations (EPS \$12).

Therefore, it is an excellent investment for the long run.

Next Report Date: Jan 26, 2021

Last Updated: Jul 21, 2020

Conviction: 75%

Price Target (Forecast Value):

Scenario	Price	Probability	Target Date	Comments
Upside	\$165.0	80.0%	Dec 28, 2021	35X CY 2021 EPS of 4.25 (10% ahead of consensus)
Downside	\$100.0	20.0%	Dec 28, 2021	25X CY 2021 Consensus

Risk Adj Price Target: \$152.00 USD | Current price: \$139.07 USD | Risk Adj Return: 9.3%

Company Description:

Search Notes Dialog:

Created by: _____ Updated by: _____

Date range: From _____ To _____ Has attachment: Yes No None

Has words: _____

Search

- Crazy fast and deep search – find anything, get as specific as you want, get your answer in a few seconds.
- Pull data into your RMS, from any source.
- Take notes anywhere, updates everywhere, automatically.

"MSCI Factor content, now available through the EDS Analytics Platform, can transform time-consuming tasks into readily available actionable insights"

John Regino – Executive Director, MSCI

