

*The way you manage risk is special  
EDS makes it scalable*

## **A MODERN PLATFORM FOR FUNDAMENTAL INVESTING**

### ***Integrate Risk into Your Investment Process***

Investors are demanding more from their risk systems, but today's platforms are inflexible and siloed. EDS breaks free of the traditional mold to provide a modern approach to risk: "a best-in-class" platform, robust configurability and the ability to maximize risk processes through deep integration with idea generation and portfolio construction.

With EDS, your team is more prepared and proactive:

Asset selection / alpha vs. common factors -growth, momentum, size, leverage, quality, macro, sectors etc.

Exposure, risk attribution and performance attribution across any model, index, sector, strategy, portfolio manager, analyst, etc.

Reporting that is configurable and able to handle multiple portfolios, asset classes & indices

Add MSCI Barra Factors, ESG, Crowding and/or any vendor to EDS.

A dedicated quant team assigned to your account



+1 646-838-4107

[sales@equitydatascience.com](mailto:sales@equitydatascience.com)

[www.equitydatascience.com](http://www.equitydatascience.com)



## INTERACTIVE USER PORTAL AND MOBILE APP



## SIMULATION AND OPTIMIZATION

- Simple, one-click simulation/optimization – Not just for risk officers anymore – ideal for analysts, traders, and portfolio managers.
- Change positions/factors and simulate portfolio impact across any metric (factors, sectors, volatility, ESG, etc.).
- Add multiple variables and rules to the simulation/optimization engine.
- Create and save multiple strategies, with mock portfolios based on outcomes (higher rates, lower oil, trade tariffs).
- Isolate changes in exposure down to the analyst or stock level across any time frame.

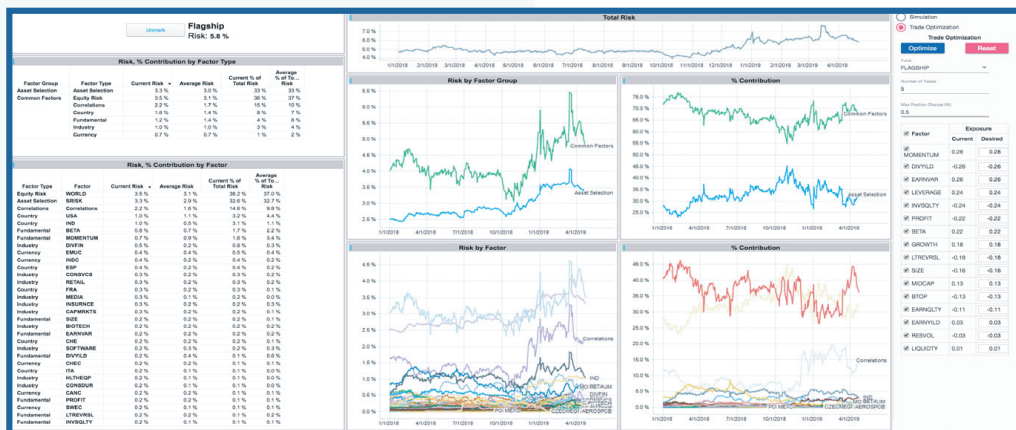
## LEVERAGING RISK FOR BETTER IDEA GENERATION & PORTFOLIO CONSTRUCTION

- Become more proactive by adding factor and/or risk exposure as an input for investment research and decisions.
- Optimize position sizing based on risk, performance or exposure metrics, such as volatility, sector and/or factor profiles.
- Understand what you are buying and what your are exposed to, before investing.
- Allocate resources to the right teams – who is contributing or detracting from performance or risk – understand where the difference is coming from.
- Understand how much of your risk comes from things you don't control.
- Add ESG as an input in the decision process.
- Identify mismatches and opportunities more effectively by bringing exposure, risk & performance attribution into the Portfolio dashboards.

*Working with EDS is like having a full quant team on staff to support your fundamental research process...only faster, more efficient, and more reliable. Table stakes for a new era of investing.*

– Multi-Billion Dollar Tiger Cub

# EDS PROVIDES RISK, PERFORMANCE AND BEHAVIOURAL ANALYSIS THAT GOES FAR BEYOND TYPICAL SOLUTIONS



## MODERN RISK & PERFORMANCE ATTRIBUTION

EDS provides a holistic approach to attribution

- Include all cash activity (inflows/outflows).
- Include position, trading & performance activity.
- Include investment decisions.
- Include investment inputs.
- Include internal/external data inputs.

These are a just a few of the ways our clients quickly gain insight into their performance.

- Are trading decisions helping performance.
- Drawdown analytics – How have past decisions, such as “adding to underperformers” worked out for our team .
- How does performance change when we reduce or raise our internal earnings estimates or price targets.
- How accurate are our projections.

Other solutions start after you've made the trade, and only look at the end result, not the reasons behind it. With EDS, your team captures all intelligence and helps you leverage your strengths and cure your blind spots.

*“What stood out to me, as I am putting this into practice with the fundamental team, is in this recent dislocation, the majority of the toolbox was not relevant, it was useless, there was no phone call you could have made to a mgt. team or no data input you could get that would explain why a stock was moving and when you should be buying or selling. But these FACTOR tools from MSCI and EDS provide a level of context, a new way of looking at things, that is historically relevant. You can get a sense for “where am I on the risk or probability spectrum.”*

**Jonathan Neitzell – Anduril Partners**