



**Equity Data Science**

**THE WAY YOU THINK ABOUT ESG IS SPECIAL.  
EDS MAKES IT ACHIEVABLE.**

## **A MODERN PLATFORM FOR ESG INVESTING**

***Integrate ESG Into  
Your Investment Process.***

With EDS:

You can leverage technology to fully understand the drivers of ESG for better investment decision-making.

Your ESG research is more productive & transparent.

You have a feedback loop to analyze and improve ESG related decision-making.

You have an effective platform to hold management teams accountable for their ESG strategies.

You have the flexibility to build your own ESG scoring to compare/contrast against consensus.

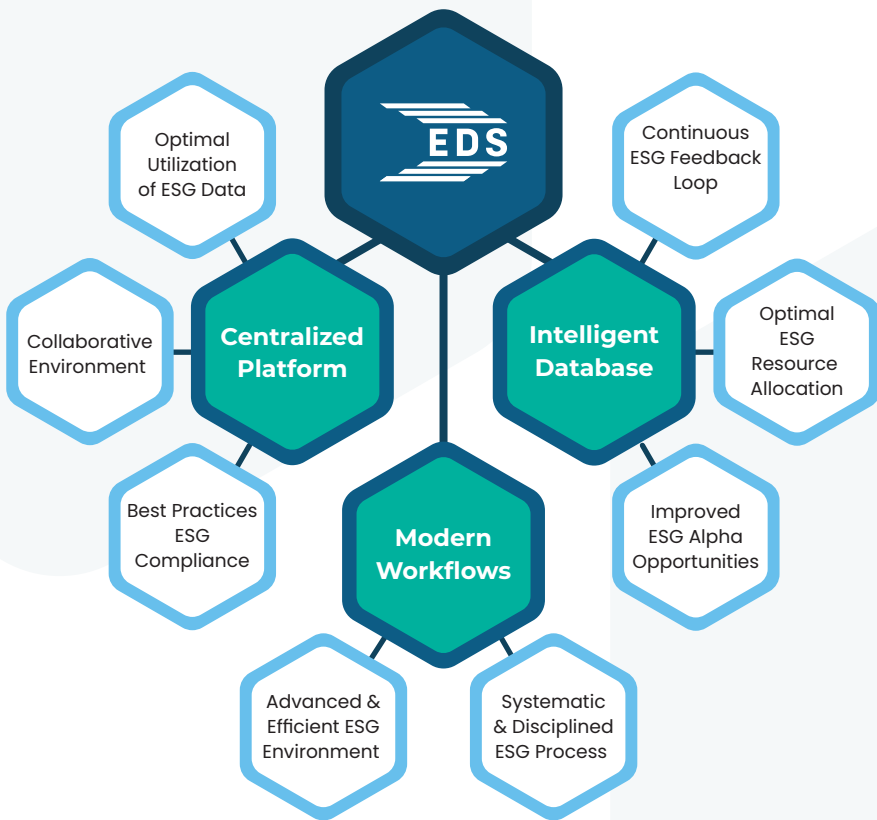
**INVESTMENT PROCESS & DECISION-SUPPORT SOFTWARE FOR  
IDEA GENERATION, PORTFOLIO CONSTRUCTION,  
RESEARCH MANAGEMENT AND RISK MANAGEMENT.**



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

## The Pillars of Scalable Investment Decision-Making

*Repeatable. Measurable. Efficient. Accessible.*



## WHY EDS?

Clients hire EDS because we drive large improvements in efficiency and critical investment workflows through a centralized platform.

### Our customers and partners include:

Leading hedge funds and asset managers like Marquee Tiger Cubs, Citadel Spins, Point72 Alums, as well as former Maverick, Viking and Bernstein Teams.



MSCI



FACTSET®

*"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."* – \$50 Billion Asset Manager - Pzena Investment Management

# Modular Suite That Integrates ESG Seamlessly Across Your Workflows

Bringing the investment process into a scalable, digital environment.



## ESG IDEA GENERATION

### Integrated ESG Data & Intelligence

Multiple vendors, aggregated and optimized in a single pane of glass.

### Flexible ESG Screening and Research

Understand & target the drivers of ESG scoring. Incorporate ESG directly into your research process – search for ESG trends that lead to better outcomes.

### Driving ESG Accountability

Search and monitor trends in ESG adherence and failures by corporate teams.



## ESG PORTFOLIO CONSTRUCTION

### Built Around Your Process

Include ESG intelligence alongside all inputs with configurable dashboards that visualize and contextualize all the data that drives investment decisions.

### Quantify Your ESG Intuition

Analyze the impact of ESG decisions. Surface ESG related opportunities & risks alongside other intelligence. Monitor and adjust ESG trends in the portfolio.

### Driving ESG Accountability

Monitor and act on positions where ESG related actions are thriving or failing.



## RESEARCH MANAGEMENT

### Works The Way You Do

Integrate ESG data and research alongside other data, in real-time.

### ESG Templates and Reporting

Custom templates, tagging and search make ESG documentation (controversies, etc.) & reporting easy.

### Driving ESG Accountability

Create internal metrics and compare ESG data against management actions – with EDS, you have a way to hold companies accountable for ESG actions.



## RISK MANAGEMENT

### Integrate ESG into Risk Management

EDS's integrated risk module integrates ESG seamlessly with idea generation and portfolio construction.

### Simulation And Optimization

Simple, powerful ESG simulation and optimization makes ESG analytics valuable for PMs and analysts.

### Risk & Return Attribution

Dissect your portfolio to understand the ESG drivers of performance (before and after the trade) at a granular level, including intra-day analysis.

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

**John Regino – Executive Director, MSCI**



## ABOUT EDS

Equity Data Science (EDS) is a platform created by a team of experienced investors, data scientists and analysts alongside engineers for simplifying the investment process.

With decades of experience in working with leading funds in the US, the founders saw the potential of investing in a technological platform – a platform which can help them build, operate and sustain a repeatable investment process.

In 2017, they realized that EDS could benefit not only them but the whole investment industry as well.

EDS enables hedge fund managers, asset managers and corporations to use the modern technology of data science and provide intelligent feedback for making decisions based on the inputs.

EDS modernizes the process and helps in supporting their decisions. It takes away ad-hoc, siloed, repetitive and error-prone processes and enables a more centralized, streamlined and disciplined process.

EDS is as unique as it is configurable to individual needs. It also measures your investment process and provides valuable feedback to drive continuous improvements, helping with your investment decisions.

## Our Vision

Our vision is a world where the investment industry can make processes scalable to help achieve business goals.

## Our Mission

Our mission is to help investors build, operate and sustain a repeatable investment process that drives continuous improvements.

## AVAILABLE SUBSCRIPTIONS:

- Includes fundamental data on global companies through FactSet
- Data science team assigned to your account
- Four available modules: Idea Generation, Portfolio Construction, Research Management (RMS) and Risk Management
- 100% configured to your workflows & internal data – value proposition is proved upfront
- Integrate any data or any vendor
- MSCI FaCS portfolio factors included (other models available from MSCI, Wolfe and others)
- Deep analytics and an intelligent decision-support database
- Risk and Return attribution
- Best practices compliance

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