



Equity Data Science

THE WAY YOU INVEST IS SPECIAL
EDS MAKES IT SCALABLE

A MODERN PLATFORM FOR FUNDAMENTAL INVESTING

***Your Investment Process.
Centralized. Efficient. Measurable.***

With EDS:

Fundamental investors leverage technology to digitize and improve their probability of success.

Investment teams are more productive, transparent and accountable.

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

Your intellectual property stays in-house, under your control, in a centralized platform that is configured to your exact requirements.

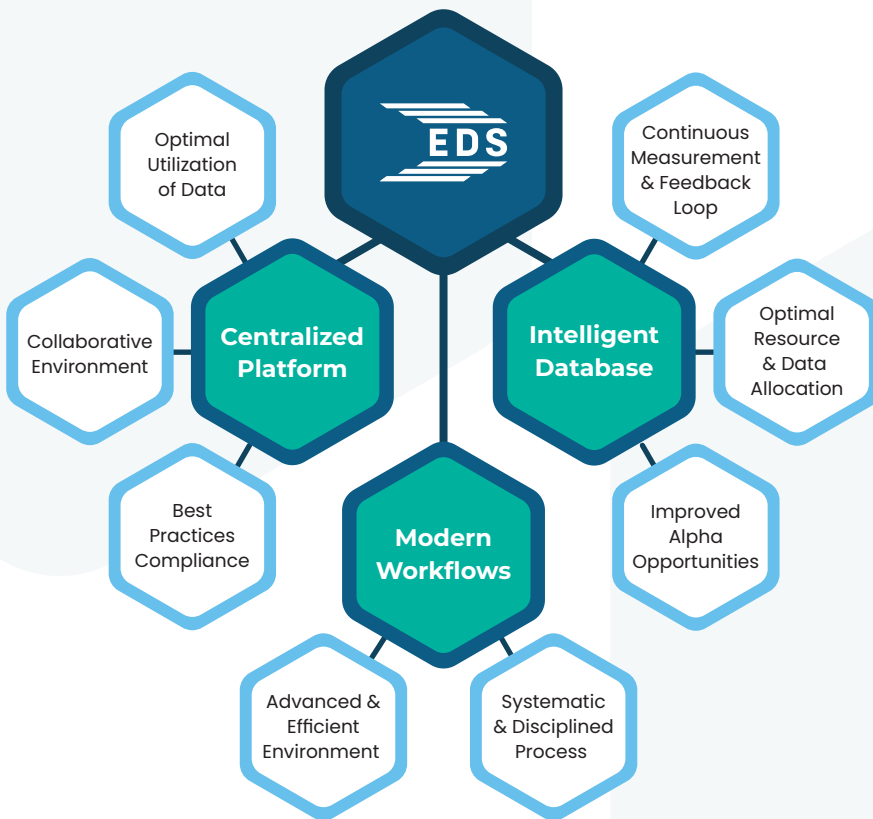
**INVESTMENT PROCESS & DECISION-SUPPORT SOFTWARE FOR
IDEA GENERATION, PORTFOLIO CONSTRUCTION,
RESEARCH MANAGEMENT (RMS) & RISK MANAGEMENT.**



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 & asset managers like Marquee Tiger Cubs, Citadel Spins, Point72 Alums, as well as former Maverick, Viking & 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 Works Seamlessly Across Your Workflows

Bringing the investment process into a scalable, digital environment.



IDEA GENERATION

Integrated Data & Intelligence

Any data, any vendor, aggregated and optimized in a single pane of glass.

Systematic Workflows

Streamline your investment process into a scalable environment for greater productivity and repeatability.

Deep Analytics

An intelligent database that automatically tracks every change, input, and decision for more powerful analytics; highlight drivers & detractors of your performance.



PORTFOLIO CONSTRUCTION

Built Around You

Fully replicate your process in a configurable, scalable digital environment to promote consistency and transparency.

Quantify Your Intuition

Analyze the strength of your ideas, the performance of your team, and the efficacy of your investment process.

See Your Strategy

Gather all intelligence in one place with configurable dashboards that visualize and contextualize the data that drives investment decisions.



RESEARCH MANAGEMENT

Works The Way You Do

Integrate market data and notes from Excel, Evernote, Slack, Teams, or any other note-taking platform.

Digitize And Simplify

Custom tagging, dynamic data updates, and deep search capability for transparency and ease. An ideal compliance solution.

Template Output

Custom templates make documentation easy: pre-earnings, post-earnings, tearsheets, marketing, quarterly reporting, etc.



RISK MANAGEMENT

Exposure Analytics

Understand exposure from portfolio level down to strategy, sector, analyst and individual positions.

Risk Decomposition

Flexible dashboards that include deep risk analysis (volatility, factors and VAR). Simulation and optimization provides instant analysis of opportunities and risks

Performance Attribution / Stress Testing

Dissect your current, projected and historical portfolio, including intra-day, factor, ESG, reporting metrics (ex. sharpe, sortino, etc.) & traditional metrics, such as by analyst, geography, sector.

"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



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 corporates, 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 investment processes scalable to help achieve business goals.

Our Mission

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

AVAILABLE SUBSCRIPTIONS:

- 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 factor integration included (other models available from MSCI, Wolfe and others)
- Deep analytics and an Intelligent decision-support database
- Risk and Return attribution
- Best practices compliance
- ESG integration

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