

Turn your RMS into a decision-making powerhouse



The EDS Research Management System (RMS) empowers you to make quicker, more informed investment decisions with actionable insights in a centralized, collaborative platform. Your time is valuable, EDS gets you the answers you need quickly. We don't force you to change, we adapt to you. EDS is organized around the firm, making it easy to record, engage, collaborate, and influence decision making through the platform, bringing it all together in one place.

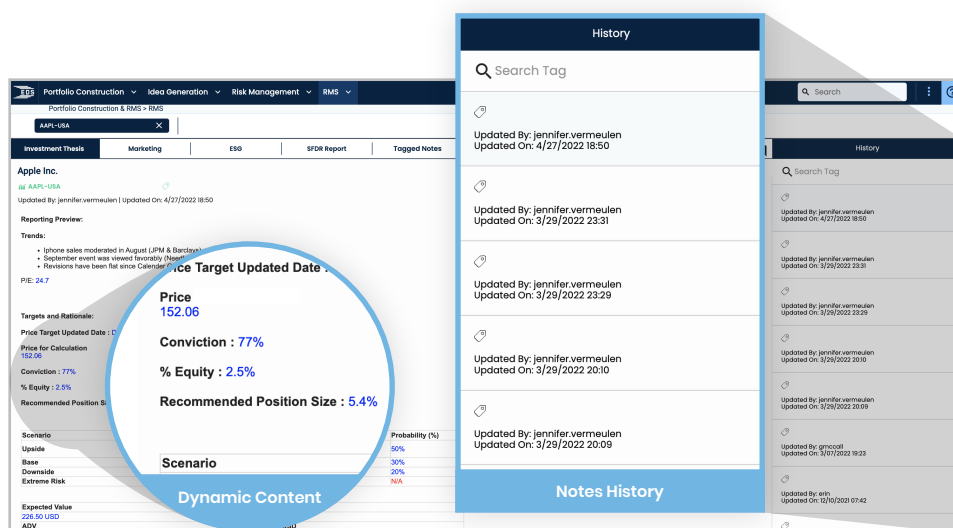
Build your customized investment thesis with templated notes

Save time preparing your research by streamlining and organizing all relevant information, including dynamic data points updated in real time

Access all your data in one place, in any configuration, with any third-party and market data

Financial models (i.e., estimates, price targets) are all automatically updated, directly from your spreadsheet

Time-stamped, historical content easily available



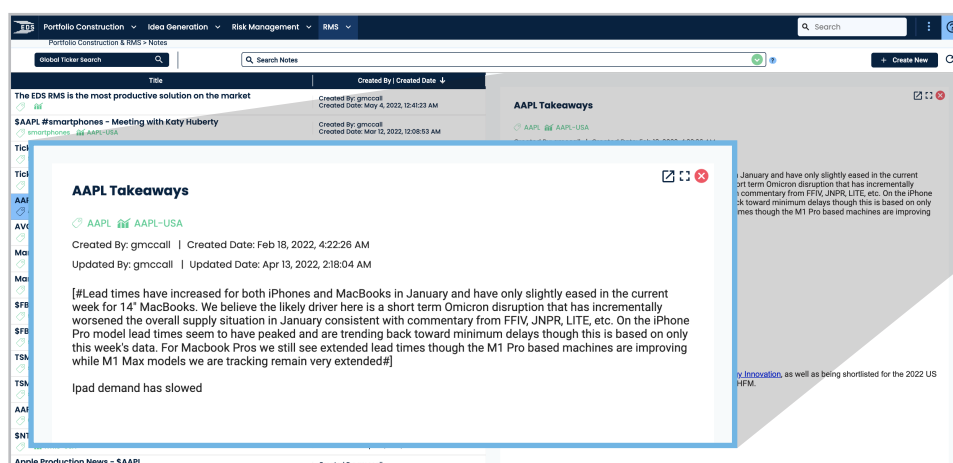
Example of a Templated Note: Combine quantitative and qualitative data in one page

Record notes where and how you want to

Utilize a rich authoring environment, or EDS captures it from your source

Access the web-based portal on desktop or while on the go with your mobile device

Add snippets while inputting your note for future reference



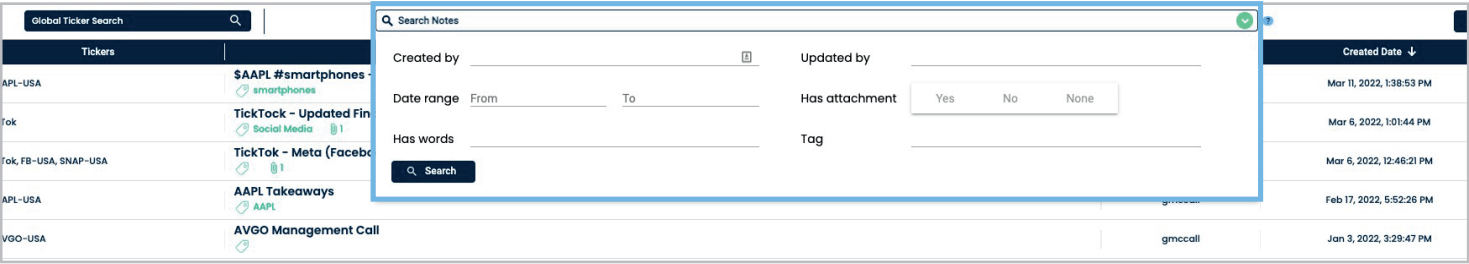
Example of a General Note: Free flowing notes most often from email, but can be sourced from anywhere

A flexible, high-performance search engine helps your team find the information that matters to your decision

Use the platform as your “best practices” compliance for any external requests

Search keywords such as “increasing margins” to view the last time forecasted margin increases were above consensus

Surface all related emails, notes, dynamic data points from financial models, and more



Example of Advanced Search

Create a snapshot for management

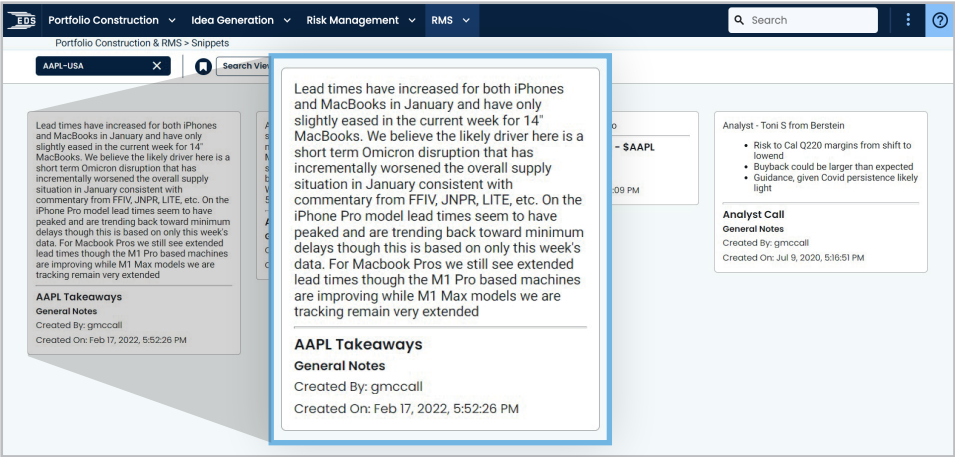
Automatically capture and highlight key takeaways from meetings to help the team efficiently understand the opportunity

Provide a PM view to easily show support details of your thesis

Search or filter by ticker for simpler view

Save views with selected criteria for easy access

Click to view full note from snippets

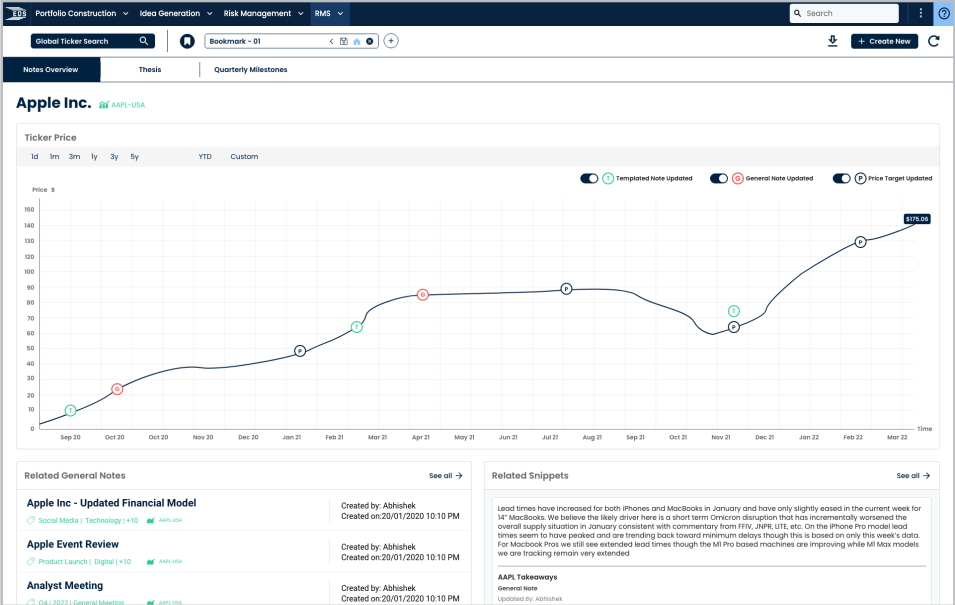


Example of Snippets: Key takeaways help make quick decisions on your investments

Validate your ideas with an RMS tear sheet

Access any decision, any data (quantitative or qualitative) in a single pane, ready for action

View your research, recommendations, ROI updates, etc. on a dynamic price chart timeline for actionable insights



Example of a Tear Sheet: See the quality and depth of research in seconds

Focus your team on best available opportunities with flexible “mission-control” dashboards

Use the portfolio dashboard to compare/contrast portfolio positions across any metric

Discover top opportunities based on criteria such as return, risk, custom formulas, conviction, factor exposure, internal vs. consensus views, etc.

Identify mis-matches, such as position size vs. return over risk

Size up your positions where you have the highest conviction / upside

Ticker	Fund / Watchlist	Price (Local)	RAR	Return Over Risk ↓	RMS Updated Date	ESG Risk Score	% of Equity	RPS	% from Adj RPS	Momentum (GEMTL)	Excess Return vs. Street
PYPL-USA	Greg	90.45 USD	176.4%	3.6		18.41	0.9%	5.6%	4.7%	-2.16	140.5%
FB-USA	Greg	212.40 USD	111.9%	2.4	Oct 4, 2021	32.44	2.2%	6.0%	3.8%	-1.01	74.6%
TSM-USA	Greg	93.23 USD	70.5%	2.2	Oct 4, 2021	13.10	2.0%	5.7%	5.7%	-0.13	12.3%
EBAY-USA	Greg	53.30 USD	68.9%	2.2		17.01	1.2%	5.7%	4.6%	-0.64	47.7%
CIEN-USA	Greg	56.19 USD	68.2%	1.5		14.41	1.3%	6.1%	4.8%	-0.39	25.6%
AMZN-USA	Greg	2,466.50 ...	66.2%	1.8	Mar 10, 2022	30.23	4.4%	5.5%	1.2%	-0.55	16.1%
AAPL-USA	Greg	159.10 USD	42.4%	1.2	Apr 27, 2022	18.41	2.6%	5.7%	3.1%	0.48	23.5%
ODFL-USA	Greg	280.89 USD	49.6%	1.7		18.44	4.2%	5.7%	1.6%	-0.26	40.9%
QCOM-USA	Greg	143.61 USD	65.7%	1.6		18.05	3.1%	5.9%	2.8%	-0.45	22.3%
AKAM-USA *	Greg	113.85 USD	30.0%	1.4		19.63	3.4%			0.08	13.8%
PH-USA	Greg	274.87 USD	31.9%	1.2		29.20	3.0%	5.7%	2.8%	-0.42	0.1%
AVGO-USA	Greg	580.45 USD	34.9%	0.8		22.41	4.7%	6.2%	1.5%	0.55	3.9%

Example of Portfolio Dashboard: FB has a higher Return/Risk but a smaller position than AMZN

Gain a higher level of conviction when making decisions

Make it easier to decide with all relevant information in front of the entire team

Position your idea vs. others in the portfolio for the correct position sizing

Use EDS in your investment voting meeting

Make well-informed, quicker decisions with your RMS

EDS has reimaged the research management system to work with you, offering workflows that match your current process, dynamic data points, and easier access to content, across the stages from research collection to investment decision analysis. Save time with a centralized, scalable and fully configurable platform while generating more thoughtful and productive conversations with your team.



Templated Notes



General Notes



Tear Sheet



Snippets

Let us know how we can help you.

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