

# EDS for Research Management



The EDS Research Management System (RMS) empowers you to make quicker, more informed investment decisions backed by actionable insights. EDS has reimagined 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. Your solution is configured based on the firm's workflows, making it easy to record, engage, collaborate, and drive decision-making in one place.

## Boost workflows efficiently and organize according to how you work

### Centralize

Bring any quantitative (estimates, models, price-targets) and qualitative information together

### Automate

Access updates in real-time from anywhere, and streamline the process

### Collaborate

Utilize configurable templates, tagging, version control and alerts

### Analyze

Review the data and connect directly to excel, internal data, or third-party applications

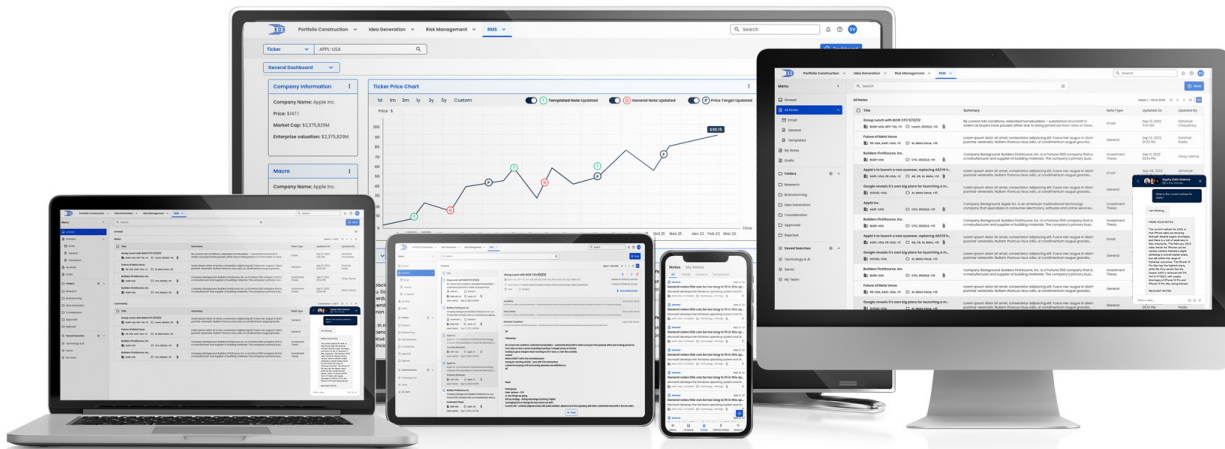
### Confirm

Support your investment decisions with real data points

### Present

Be ready to share your findings directly on screen, all in one place

## The EDS RMS is a decision-making powerhouse



### MyRMS

Make it easier to decide next best actions

### General Notes

Save your detailed information in free form

### Templated Notes

Build your customized investment thesis with templates

### Email Notes

Organize emailed notes for quicker reference

### Snippets

View highlights of notes for a bird's eye view

### AI mode

Leverage AI to surface answers easily from your data on EDS

## Our solutions help you determine:

- *What management is saying about margins last year*
  - *Which ideas meet your objectives and when your last touch point was*
  - *Which analysts are consistently making the best forecasts and staying up-to date on their names*
  - *When the last time you increased your price targets was*
  - *The easiest ways to communicate with your investors*
  - *How to keep your intellectual property safe*
  - *How to stay in compliance*
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## Gain a higher level of conviction when making decisions

- Use the platform to validate your ideas 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

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## Find out how your team can benefit from EDS through a Proof-of-Concept (POC)

Experience first-hand how EDS can digitally transform your workflows without losing your secret sauce. There is no commitment and our impact on your team is minimal. During the POC, we will configure your critical workflows. We quickly implement our modular, cost-effective solution to demonstrate how EDS improves decision-making and your investment process.

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### Let us know how we can help you.

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