

# Improve your results with contextual search

**Fincentric's search and indexing capability quickly and easily returns personalized results across documents and data with intuitive interfaces and multiple layers of prioritization and customization.**

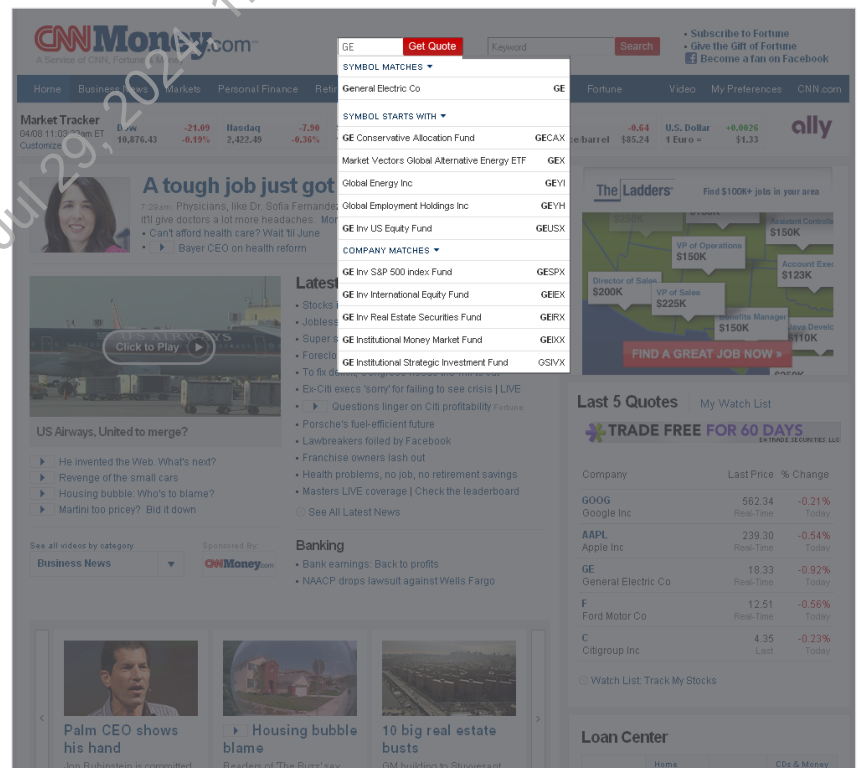
## Find what you're looking for

Our search capability quickly indexes and tags data, standardizing ingestion and enabling customized search queries for everything from screeners and news to press releases and securities listings.

Search queries can be set to return predictive (type-ahead) results, exact matches or the most popular results. Typo tolerance reduces the burden of accuracy for users, which can be especially helpful for mobile users.

## Why Elasticsearch?

Elasticsearch provides a Google-like search capability with the ability to customize results. It's schema-less, and easily accommodates structured and unstructured data. This fault-tolerant search technology is well supported and widely adopted (Netflix, Mozilla, Facebook, Cisco, Microsoft, Adobe, Github, twilio, Workday).



**13.5K**

Peak symbol search requests per minute

**11M**

Average document requests per week

**27ms**

Average document search response time

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**Kimberley Floyd**  
Financial Advisor  
Log out

AUM / LAST MONTH CHANGE  
**\$8.6M / +4.56%**

DAILY  
NIB -560,228  
PRODUCTION \$81,326

MTD  
-54,646,656  
\$283,085

YTD  
\$12,840,628  
\$51,765,612

SCORECARD

U.S. 10 YEAR TREASURY  
**2.98% +0.02**  
See Additional Rates

Welcome Back to  
You have 12 items to review -

4th /126 Anne Young ↑  
Total Current Revenue  
\$12.2M

Opportunity

It's Time to Reach  
60% of clients have seen po  
have seen performances fal

Performance for Last 3 Months

**XOM**

**Search Results**

**Exxon Mobil Corporation**  
Stock XOM : NYSE \$80.86 +0.15 (0.19%)

1.2% of your book, \$0.8M in Assets 134 Households | Gain/Loss Analysis | 15 Trades This Week

**News**

Exxon May Pursue Oil and Gas Exploration in Israel -Reuters  
34 minutes ago

Exxon Mobil Stock Takes a Hit on a New Downgrade -- Barrons.com  
1 hour ago

ExxonMobil shares fall 1.6% premarket  
2 hours ago

**Events**

**MAR 25** EARNINGS ANNOUNCEMENT  
Q1 2019 Earnings Estimate at \$0.88

**MAR 5** DIVIDEND PAYMENT  
\$3.28 from Q1 2019 Dividend Paid to 134 Households

**Related Investments** 24 XOM Corporate Bonds Top 10 Holdings in 151 ETFs 89 Mutual Funds

**WEC Energy Group**  
3M Performance +6.22% Total AUM \$1.5b

**Coca-Cola Co**  
3M Performance +6.13% Total AUM \$1.2b

**Gilead Sciences Inc**  
3M Performance +5.89% Total AUM \$1b

**Zimmer Biomet Holdings**  
3M Performance -5.89% Total AUM \$1b

## How it works

Data is loaded (indexed) into Elasticsearch where it can be queried. Differing query parameters can be applied to bring results which match various search criteria to the forefront of the results. Fincentric has created standard, simple interfaces to load data that is important to you into Elasticsearch, and run queries across the data set, allowing you to bring your own data, or use of the 4,000 unique integrated data feeds, using the appropriate data agreements.

## Symbol search

Paired with our robust cross-reference/search capability (Xref), you can tune search queries to return the most relevant and interesting securities in the market. Unlock the ability to prioritize search results based on symbols in the user's watchlist or holdings, or securities on the local exchanges over worldwide offerings.

## Document management search

Search millions of documents by type, author, title, published date and time, security, sector/industry, geographical location, or any combination of the tagged meta-data. Easily upload your documents to be indexed, tagged and searchable.