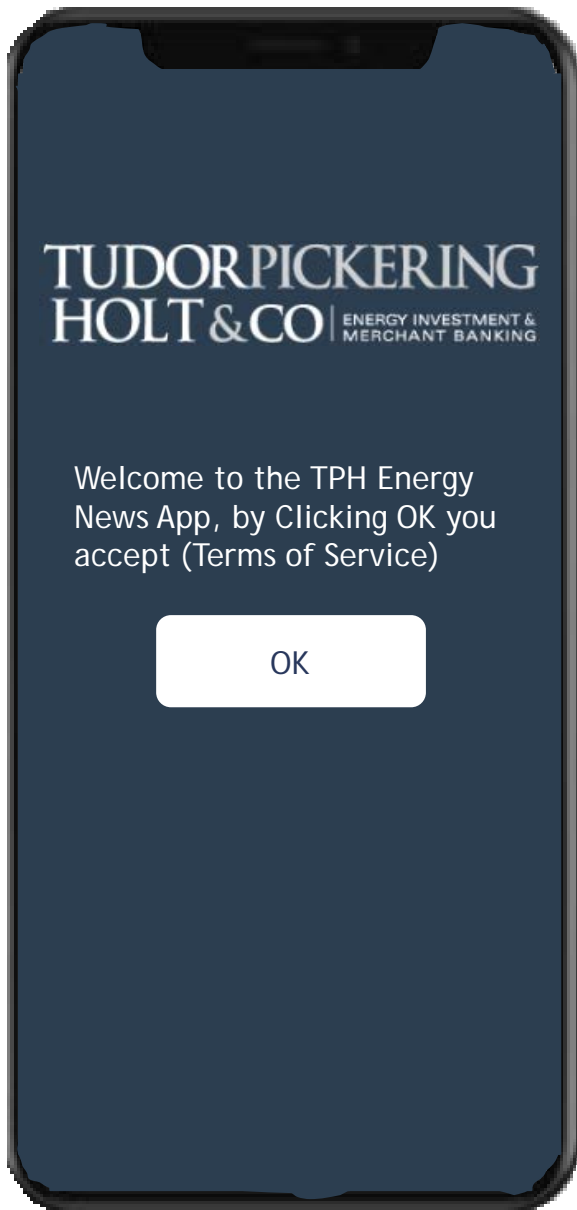
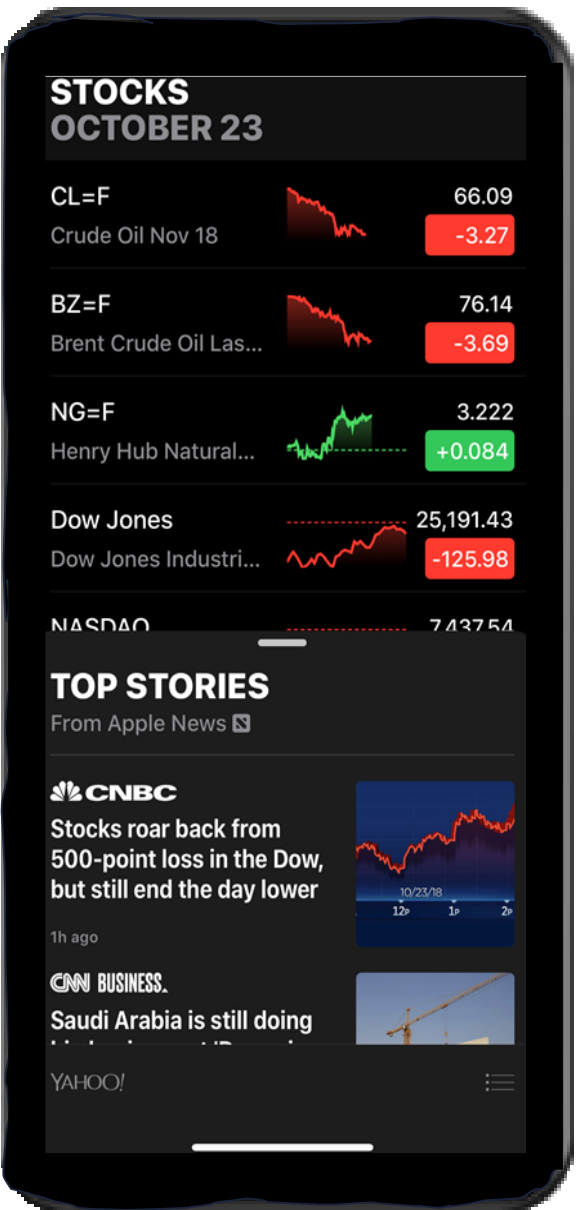


Tudor Pickering Holt & Co.

Energy Stocks, News & Events App

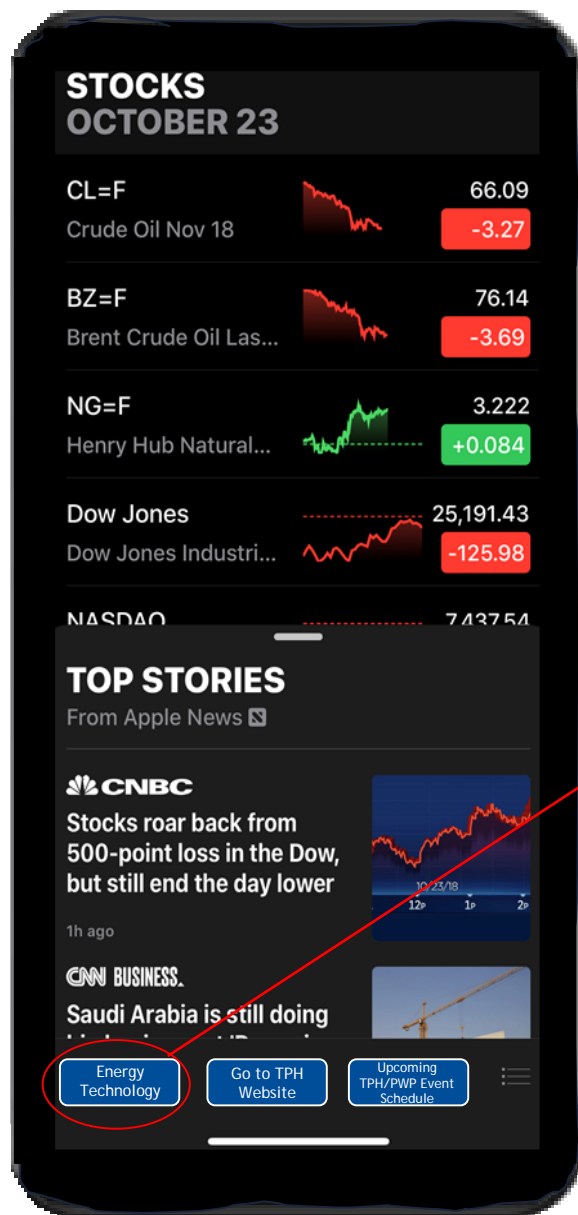


☐ Before you get to the full stock screen you will have to click OK on a Copyright and FINRA Rule 2210 Notification

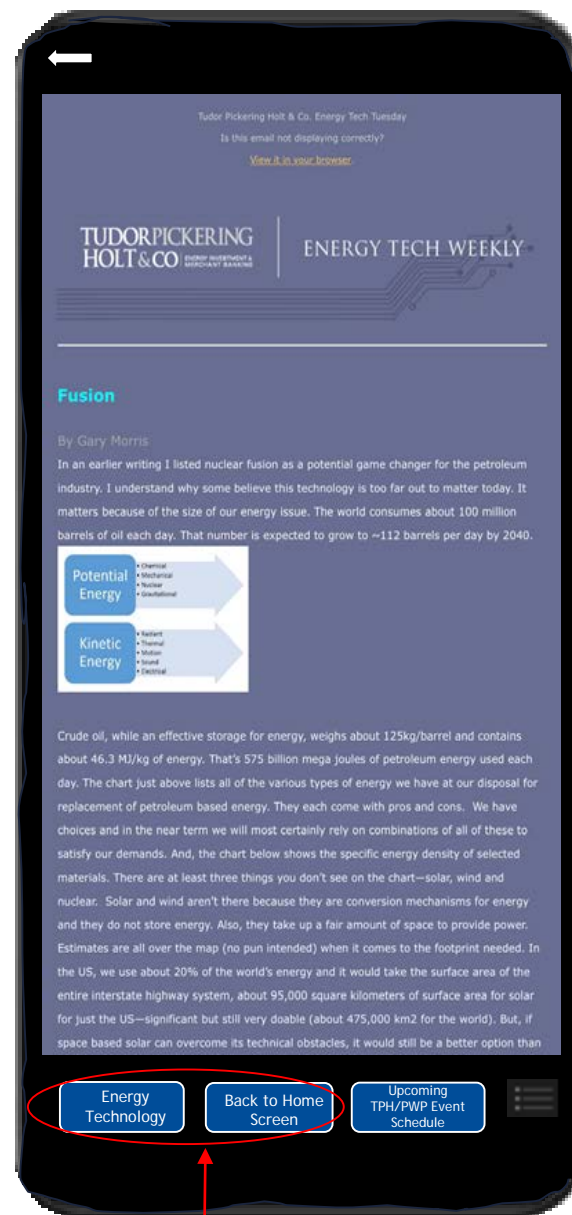


☐ Want this to have a black background, it makes the reds and greens in the charts pop more. The stories will be Energy Only and also any thing that pops out that is TPH or PWP related.

☐ TPH will pay for the API's for the stock pull and also the news aggregation



☐ Buttons at the bottom to get from the main screen to other functionality, these are static and will remain while in the main portion.



☐ This changes once into Energy Tech so you can search or go to a previous screen

The most recent energy tech will load and then the screen to the left will be below it as you scroll and you can click a date and it will take you to that older one.



E-Mail

First Name

Last Name

Company

Position

SUBMIT

TUDORPICKERING
HOLT & CO | ENERGY INVESTMENT &
MERCHANT BANKING

☐ Need to have people submit an email and first and last name, and when they do it will send us an email that they are looking at it and then we can keep a record of who is seeing it as we will then have this list and add them to a distribution and then if they opt out we will remove them from the access on the app so that we have an accurate list of who sees it if FINRA asks.

☐ This will also be information we will add to our salesforce database. Where we grant and remove subscriptions from individuals.

☐ In the future, if we add our morning note to this app. This will likely become the home login screen for that and have a different set of permissions

Scope

Core Functionality Required for the Initial Release Will Include

- ☐ Design, develop and deploy an Apple iOS and Android native mobile app to iTunes and Google Play stores, respectively.
- ☐ Design modern, responsive web application (not a PWA) that goes along with the app so it can be used in a web browser.
- ☐ The software and native mobile apps will allow anybody to view stock prices and energy news.

Feature List

- ☐ Welcome Page
 - Has an ok page with disclaimers.
- ☐ Stocks will come up first and be the landing page
 - Upstream, Midstream and Others will be an option and each will have a list you can move up or down.
- ☐ News will be slide-able up and down and will be energy news
 - Would like to flag or remove news items or drag the up or down for relevance or if TPH is in an article, have that one on the top.
- ☐ At the bottom of the landing page it will have part where you can click into the Energy Tech or TPH Events.
 - These are content that can possibly be linked to a web page if this is easier.
- ☐ Energy Tech Page
 - First time in you have to submit your email to see it, we will make sure to match up our subscriptions so that our lists match and it is a source of truth for FINRA.
 - Can click past dates and it expands and shows the previous weeks e-tech's.

API's Needed

- ☐ Stock Puller
- ☐ News Aggregator

Scope

Rob will be available generally 7 days a week and I am generally very quick to respond (you have to be in banking!).

☐ Would like to have at a minimum, weekly progress meetings. However if there are problems or questions, the more communication the better.

☐ You can go as deep as you want on this, I want to understand it at a high level too and be involved in putting out a quality product.

☐ TPH will have an NDA to sign.

☐ Likely to engage for additive work on this app to install more features.

GOAL

☐ Overall this is a product that is hard to put at dollar value on for business and revenue generation as we are not charging for it. However there are no other banks that we compete with that have anything like this. It should be a great marketing tool if done right!

☐ Most people that use either Bloomberg or Yahoo or others hate how the stocks are displayed or how much of a pain it is to add your whole list of stocks, our already populated energy industry sector solve that problem.

☐ Having the top energy C-Suite professionals using this to check equity prices and news thus adding to goodwill and occupying mind space!

Why do you want to do this?

- ☐ While this might not be other apps out there, it would give you the experience of integrating more than one API into a single app.
- ☐ Possibility of continued work on future updates to app.
- ☐ Exposure to what it takes to get a product done within the framework of a company who has legal disclaimer obligations, in this case FINRA.
- ☐ Rob will be the main decision maker and point of contact, very responsive.
- ☐ TPH has an in-house graphics team we can leverage for artwork and design.
- ☐ A designed by contact can be added to the settings menu, possibly setting up future work as this app will be used by energy professionals who are diving head first into the digital platforms.