



FINM 32500 Computing for Finance in Python

Project Part 3

Competitor Analysis Report

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Bloomberg Professional Services

Overview: Bloomberg and its flagship product, the Bloomberg Terminal, offer real-time data, news, and analytics to financial professionals. Bloomberg's emphasis on real-time data aggregation and pricing capabilities aligns with our platform's goal to integrate live and historical datasets for seamless analysis.

Features:

- Extensive market data coverage.
- Real-time analytics and news services
- Enterprise data solutions with a comprehensive data catalog.

Pricing Model: Subscription-based pricing depending on the required services and data access. For its Bloomberg.com subscription, the cost is \$149 for the first year and then \$299 annually for the subsequent years.

Differentiation: Bloomberg Terminal can be used to price complex financial instruments such as bonds, interest rates, and cross-currency swaps, FX products based on current market prices for those instruments by collecting up-to-date market data such as interest and FX rates for various currencies.

Website: <https://www.bloomberg.com/professional/products/data/enterprise-catalog/>

Refinitiv (An LSEG Business)

Overview: Refinitiv offers a wide range of data and insights across financial markets, powered by Reuters news. Our platform's integration with news sentiment analysis (e.g. NewsDataModel) can emulate and extend Refinitiv's strength by combining sentiment scoring with intraday pricing.

Features:

- Extensive financial data coverage, including equities, fixed income, and commodities.
- Advanced analytics and trading platforms.
- Data management solutions with a focus on compliance and risk management.

Pricing Model: Subscription-based pricing tailored to the selected services and data packages.

Differentiation: Has exclusive access to Reuter News, ensuring that users receive timely and reliable information verified by qualified journalists and media producers.

Website: <https://www.lseg.com/en/data-analytics/financial-data>

S&P Global Market Intelligence

Overview: Through S&P Global Market Intelligence, S&P offers credit research and data analytics related to a financial institution, company, sovereign, and industry. S&P assigns credit ratings based on their perceived risk: credit risk, market risk, and operational risk. S&P also incorporates ESG scores in its evaluation of an institution's risk. While our platform does not explicitly offer credit rating tools, its flexibility allows users to replicate such analyses with custom transformations and workflow automation.

Features:

- Tools to generate numerical scores that are aligned with S&P Global Ratings' criteria and further supported by historical default data dating back to 1981
- In-depth industry research, focusing on the credit risk profile of each institution and their risk of default

Pricing Model: Subscription-based pricing depending on the required services and data access.

Differentiation: It has a well-defined risk-assessment template created by industry professionals to assess the risk of each financial institution.

Website: <https://www.spglobal.com/market-intelligence/en>

Morningstar Direct

Overview: Morningstar Direct provides in-depth investment research on companies, index funds, equities, fixed income, and industry. Morningstar also provides investment recommendations, outlining which companies to invest based on current data. Morningstar's focus on recommendations and portfolio management aligns with our platform's ability to run backtests and event studies using pre-built models (e.g. IntraDayModel)

Features:

- Comprehensive coverage of mutual funds, ETFs, stocks, and bonds.
- Analyst reports offering qualitative analysis and ratings.
- Portfolio management tools for construction and monitoring.

Pricing Model: Subscription-based, \$249 for an annual membership or \$34.95 for a monthly membership.

Differentiation: Provides investment recommendations based on data and analysis.

Website: <https://www.morningstar.com/business/brands/data-analytics/products/direct>

YCharts

Overview: YCharts is a fully integrated, dynamic asset manager software that provides financial data and analysis tools. It is tailored for investment advisors and asset managers.

Features: Tools to track model performance, illustrate economic trends, and deliver solutions for business challenges.

Differentiation: Emphasizes ease of use and visual appeal to present data and analysis in a very digestible way for users.

Website: <https://ycharts.com/>

Key Takeaways:

- Provide flexibility for distinct data categories: Equities, fixed income, economic data, etc.
- Have the ability to integrate up-to-date data from financial news and databases.
- Present analysis in a clean and digestible manner so that users can immediately understand the proposed trade and portfolio management strategy.
- Our platform excels with flexible data categorization and advanced analysis tools like NLP, while custom transformations enhance flexibility.