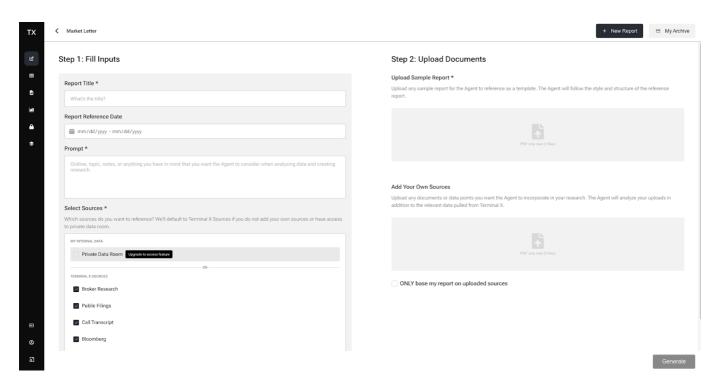
# Write Complex Finance Research Reports in less than an hour

We're excited to announce we've launched our new Custom Report Builder feature that allows you to generate finance-specific report drafts, such as Market Letters, Investment Memos, and Due Diligence Questionnaires (DDQ), in minutes! Learn how you can get the perfectly formatted report with all the right research pulled—Terminal X's Custom Report Builder is built to save you hours.

View Sample Market Letter

### Market Letter — How it's done on Terminal X

Let's imagine you have to write a market update letter to your clients on *Trump Tariffs* ASAP.



#### Give foundational instructions

Here, you are instructing our AI Agent how you'd like your report to be structured and specify the types of sources to incorporate into your letter's content.

Input Examples & Best Practice

Input Fields	Example	Best Practices
Report Title Required	Trumps Reciprocal Nightmare	Best to put your topic
Report Reference Date Optional	Apr 2 2025 - Apr 3 2025	The date of the event or coverage range of sources you want
Prompt Required	Market report on the liberation day, focusing on reciprocal tariffs, wall street and market reactions, and outlook post announcement	The more detailed the better. Provide context for focus, items to cover etc to ensure it addresses. If there is little context, our system will determine its own.

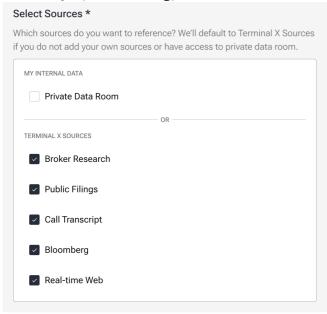
Select Sources Required	"All Sources" are selected by default	If it's an obscure topic, we recommend including websearch for better results.
Upload Sample Report Required	Past market letters written	Market letters with clear headers and table of content.
Add Your Own Sources Optional but recommended	Any private data you own and wish to reference in the letter, e.g. Broker Research, other similar market letters, web sources, Bloomberg articles, etc.	Any pdf documents with research you want to highlight in the content of the report.

#### Tailor your report to your preference

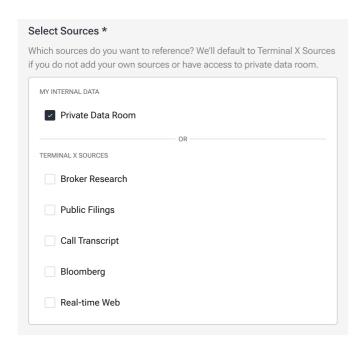
- ☑ Upload a Sample Report Want your report to match your firm's style? Simply upload a past market letter, and our agent will **mirror its structure**, **length**, **and formatting**—but with your new topic and data.
- Add Your Own Sources Have proprietary research or third-party reports? Upload them, and our agent will **prioritize these insights** while drafting your report.
- Total Data Security Every report is built in a **highly controlled, auditable** process. We never store your uploaded files or data, ensuring complete confidentiality.

## Control the research and dataset that powers your reports

By default, our AI agent pulls from trusted sources like **Broker Research**, **Public Filings**, **Call Transcripts**, **Bloomberg**, **and Real-time Web** data.



If you have integrated your firm-wide private data to Terminal X, you can select "**Private Data Room**" as the source you want to reference. In that case, our Agent will only reference information from your internal data to generate the contents in the report.

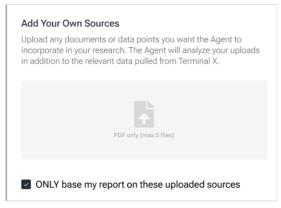


Many of our Enterprise Clients prefer to integrate their firm-wide private data with Terminal X to utilize it as a **Centralized Research Hub** that:

- Searches and pulls insights from both private and public data
- ✓ Generates high-quality investment memos and market letters
- ✓ Streamlines firm-wide knowledge sharing—all in a secure and seamless way

This eliminates the need to sift through countless files for that investment memo or research from years ago, saving you valuable time, enhancing productivity (our client-reported ROI on such workflow is 15x) when referencing past work for your current reports.

You can also choose to base your report solely on your own uploaded sources by clicking on the "ONLY base my report on these uploaded sources" checkbox. Giving you a granular level of source control.



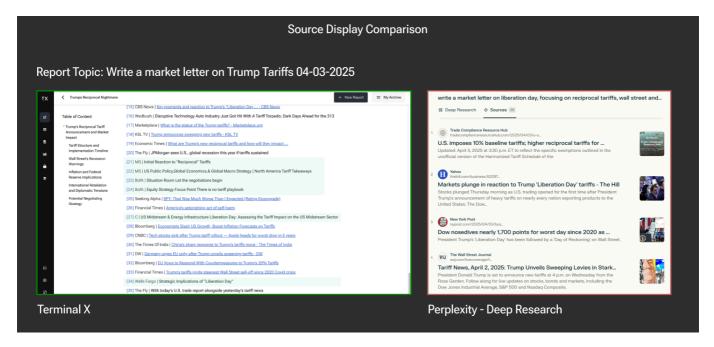
Every report created in Terminal X includes in-line citations, so you can audit sources at a glance. **No black box.** 

Review generated report

Our AI Agent structures the letter, pulling relevant insights from trusted sources so you can quickly refine and finalize. Giving you a report created in **5-20 minutes**.

#### **Terminal X vs Other Gen AI tools**

When we tested the Market Letter report feature across Gen AI platforms, Terminal X clearly outperformed. Our agent cited premium sources like Bloomberg and CNBC, along with investment research from Morgan Stanley, Bank of America, and other top-tier institutions. The competing tool? No institutional research, fewer citations, and weaker insight.



When we asked Perplexity "compare the two market reports. analyze which one's better for the finance vertical and why", it chose Terminal X.

Criteria	Trump-Tariffs-Market-Letter-TTX.pdf (Report 1)	Trump's-Reciprocal-Nightmare.pdf (Report 2)
Market Impact Analysis	Provides a detailed breakdown of the stock market's reaction, including specific indices (S&P 500, Nasdaq, Dow) and sector-specific impacts (e.g., technology, manufacturing).	Briefly mentions market declines but lacks granular details on sector-specific impacts and broader implications for financial markets.
Economic Implications	Covers potential recession risks, inflationary pressures, and Federal Reserve policy responses in depth, with insights from major banks like JPMorgan and Morgan Stanley.	Touches on recession risks and supply chain disruptions but provides less detailed economic analysis or expert commentary.
Tariff Structure Details	Explains the tariff structure comprehensively, including baseline tariffs, country-specific rates, and their calculation methodology.	Discusses tariff structures but with less granularity compared to Report 1.
Global Reaction	Includes responses from key trading partners like China and the EU, highlighting potential retaliatory measures and diplomatic tensions.	Mentions international reactions but lacks the depth and breadth seen in Report 1.
Relevance to Finance	Highly relevant for financial professionals due to its focus on market performance, economic forecasts, and investment implications.	Less focused on financial markets; more general in its approach to trade policy impacts.

Needless to say, we agree.

Try out our current report builder feature to create Market Letters, Investment Memos and Due Diligence Questionnaires on <a href="https://theterminalx.com/agent/enterprise">https://theterminalx.com/agent/enterprise</a>

## What's next?

We're expanding our report offerings! Upcoming templates include:

★ Earnings Call Q&A Reports

Quarterly Investor Update