

# 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.

TX

Market Letter

New ReportMy Archive

Step 1: Fill Inputs

Report Title \*

What's the title?

Report Reference Date

mm/dd/yyyy - mm/dd/yyyy

Prompt \*

Outline, topic, notes, or anything you have in mind that you want the Agent to consider when analyzing data and creating research.

Select Sources \*

Which sources do you want to reference? We'll default to Terminal X Sources if you do not add your own sources or have access to private data room.

MY INTERNAL DATA

Private Data Room

Upgrade to access features

OR

TERMINAL X SOURCES

☒ Broker Research

☒ Public Filings

☒ Call Transcript

☒ Bloomberg

Step 2: Upload Documents

Upload Sample Report \*

Upload any sample report for the Agent to reference as a template. The Agent will follow the style and structure of the reference report.

PDF only max (1 file)

Add Your Own Sources

Upload any documents or data points you want the Agent to incorporate in your research. The Agent will analyze your uploads in addition to the relevant data pulled from Terminal X.

PDF only max (5 files)

☐ ONLY base my report on uploaded sources

Generate

### 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 <i>Required</i>	Trumps Reciprocal Nightmare	Best to put your topic
Report Reference Date <i>Optional</i>	Apr 2 2025 - Apr 3 2025	The date of the event or coverage range of sources you want
Prompt <i>Required</i>	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 <i>Required</i>	"All Sources" are selected by default	If it's an obscure topic, we recommend including websearch for better results.
Upload Sample Report <i>Required</i>	Past market letters written	Market letters with clear headers and table of content.
Add Your Own Sources <i>Optional but recommended</i>	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.

Select Sources \*

Which sources do you want to reference? We'll default to Terminal X Sources if you do not add your own sources or have access to private data room.

MY INTERNAL DATA

☐ Private Data Room

OR

TERMINAL X SOURCES

☒ Broker Research

☒ Public Filings

☒ Call Transcript

☒ Bloomberg

☒ Real-time Web

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.

### Select Sources \*

Which sources do you want to reference? We'll default to Terminal X Sources if you do not add your own sources or have access to private data room.

#### MY INTERNAL DATA

☒ Private Data Room

OR

#### TERMINAL X SOURCES

☐ Broker Research

☐ Public Filings

☐ Call Transcript

☐ Bloomberg

☐ Real-time Web

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**.

#### Add Your Own Sources

Upload any documents or data points you want the Agent to incorporate in your research. The Agent will analyze your uploads in addition to the relevant data pulled from Terminal X.



PDF only (max 5 files)

☒ ONLY base my report on these uploaded sources

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.

Source Display Comparison

Report Topic: Write a market letter on Trump Tariffs 04-03-2025

TX

Trump's Reciprocal Nightmare

New Report

My Archive

Table of Content

Trump's Reciprocal Tariff Announcement and Market Impact

Tariff Structure and Implementation Timeline

Wall Street's Recession Warnings

Inflation and Federal Reserve Implications

International Retaliation and Diplomatic Tensions

Potential Negotiating Strategy

[15] CBS News | Key moments and reaction to Trump's 'Liberation Day' — CBS News

[16] Webdash | Disruptive Technology Auto Industry Just Got Hit With A Tariff Torpedo: Dark Days Ahead for the 313

[17] Marketplace | What is the status of the Trump tariffs? - Marketplace.org

[18] KSL TV | Trump announces sweeping new tariffs - KSL TV

[19] Economic Times | What are Trump's new reciprocal tariffs and how will they impact ...

[20] The Fly | JPMorgan sees U.S., global recession this year if tariffs sustained

[21] MS | Initial Reaction to "Reciprocal" Tariffs

[22] MS | US Public Policy/Global Economics & Global Macro Strategy | North America Tariff Takeaways

[23] BoFA | Situation Room Let the negotiations begin

[24] BoFA | Equity Strategy Focus Point There is no tariff playbook

[25] Seeking Alpha | SPY That Was Much Worse Than I Expected (Rating Downgrade)

[26] Financial Times | America's astonishing act of self-harm

[27] C | US Midstream & Energy Infrastructure Liberation Day: Assessing the Tariff Impact on the US Midstream Sector

[28] Bloomberg | Economists Slash US Growth, Boost Inflation Forecasts on Tariffs

[29] CNBC | Tech stocks sink after Trump tariff rollout — Apple heads for worst drop in 5 years

[30] The Times Of India | China's sharp response to Trump's tariffs move - The Times of India

[31] DW | Germany urges EU unity after Trump unveils sweeping tariffs - DW

[32] Bloomberg | EU Vows to Respond With Countermeasures to Trump's 20% Tariffs

[33] Financial Times | Trump's tariffs ignite steepest Wall Street sell-off since 2020 Covid crisis

[34] Wells Fargo | Strategic Implications of "Liberation Day"

[35] The Fly | With today's U.S. trade report alongside yesterday's tariff news

Terminal X

write a market letter on liberation day, focusing on reciprocal tariffs, wall street and...

Deep Research

Sources 28

1 Trade Compliance Resource Hub  
tradecompliancesourcehub.com/2025/04/03/u-s-...  
U.S. imposes 10% baseline tariffs; higher reciprocal tariffs for ...  
Updated: April 3, 2025 at 3:30 p.m. ET to reflect the specific exemptions outlined in the unofficial version of the Harmonized Tariff Schedule of the

2 Yahoo  
rethill.com/business/52297...  
Markets plunge in reaction to Trump 'Liberation Day' tariffs - The Hill  
Stocks plunged Thursday morning as U.S. trading opened for the first time after President Trump's announcement of heavy tariffs on nearly every nation exporting products to the United States. The Dow...

3 New York Post  
nypost.com/2025/04/03/bus...  
Dow nosedives nearly 1,700 points for worst day since 2020 as ...  
President Trump's 'Liberation Day' has been followed by a 'Day of Reckoning' on Wall Street.

4 The Wall Street Journal  
wsj.com/news/economy/1...  
Tariff News, April 2, 2025: Trump Unveils Sweeping Levies in Stark...  
President Donald Trump is set to announce new tariffs at 4 p.m. on Wednesday from the Rose Garden. Follow along for live updates on stocks, bonds and markets, including the Dow Jones Industrial Average, S&P 500 and Nasdaq Composite.

Perplexity - Deep Research

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)
<b>Market Impact Analysis</b>	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.
<b>Economic Implications</b>	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.
<b>Tariff Structure Details</b>	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.
<b>Global Reaction</b>	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.
<b>Relevance to Finance</b>	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 <https://theterminalx.com/agent/enterprise>

## What's next?

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

📌 Earnings Call Q&A Reports

📌 Quarterly Investor Update