

Getting started with search

Searching a single company

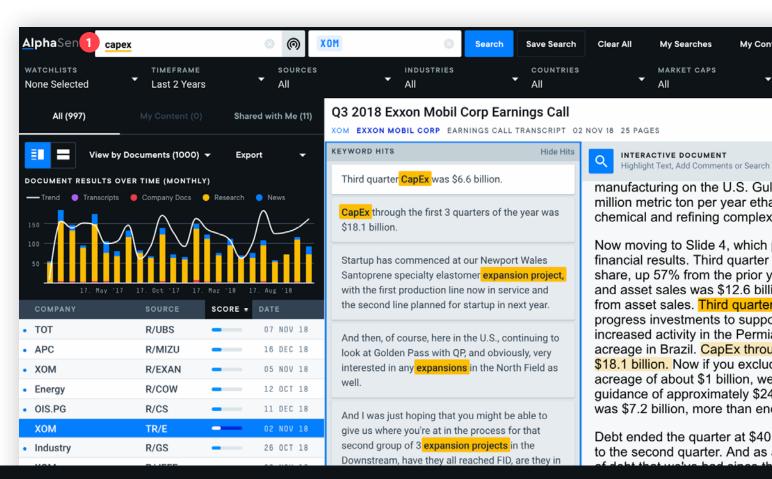
Single company search uncovers buried data points across sources including broker research, filings, transcripts, press releases, investor presentations, news and trade journals and much more.

In the **Keyword** search bar enter keywords or themes of interest. In the **Ticker/Company** search bar type in the name or ticker of a public or private company.

1 The keyword "capex" is underlined in yellow, indicating that it's a *smart synonym*.

SMART SYNONYMS expand keyword searches to include synonyms, while screening out undesirable results for keywords with multiple meanings. They

compensate for the many different ways companies, analysts and journalists can reference the same theme or topic to ensure that you don't miss critical information. In this case, a search for capex also finds XOM's mentions of expansions and expansion projects.





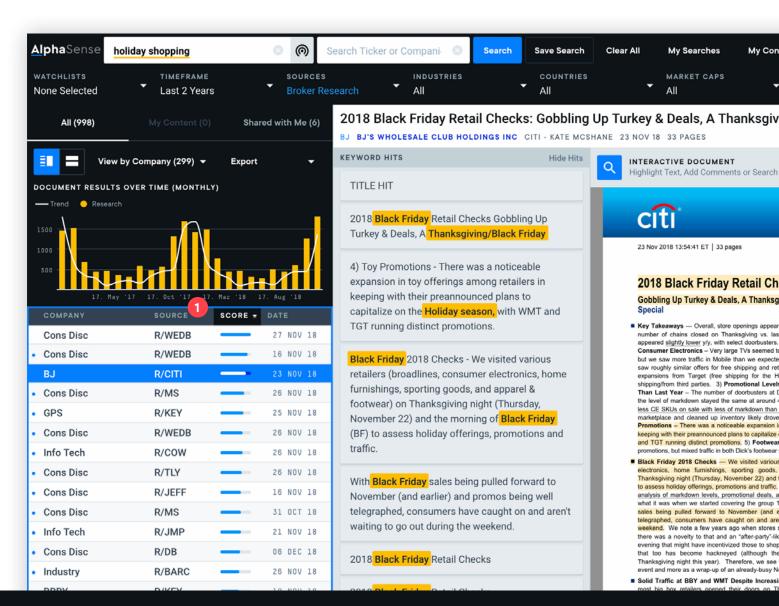
Searching across a single source

Searching across a single source allows you to limit search results to a single content set.

Isolating broker research, one of AlphaSense's most popular content sets, allows clients to quickly understand what industry analysts are saying about their company or industry.

To search specifically across broker research, go to the **Sources** filter and mouse over Broker Research. 'Only' will appear as an option. Click 'Only' to isolate the search to only Broker Research.

1 RELEVANCE SCORE Try ranking results by "Score" in the left-hand document pane. This utilizes our relevance algorithm to ensure the documents that have the most meaningful information rise to the top of the list.



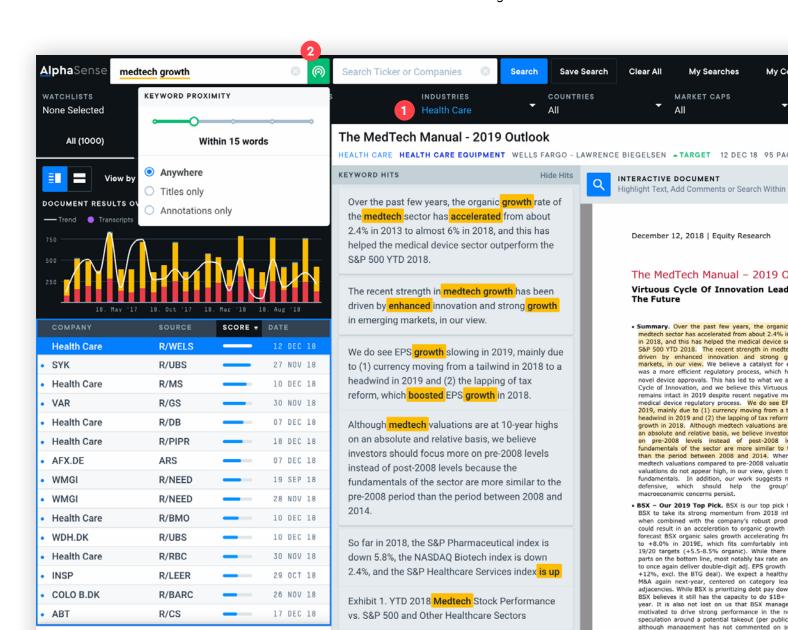


Searching across multiple companies

Searching across multiple companies gives you an understanding of how key industry players are thinking about a specific theme or trend.

To conduct a cross-company search, enter a theme in the **Keyword** search bar, and leave the **Company/Ticker** bar empty. Choose an industry in the Industries filter.

- 1 INDUSTRY FILTER Search by industry or sub-industry. To refine your search, mouse over an industry and the word 'Only' will appear as an option. Click 'Only' to isolate the search a single industry or sub-industry.
- 2 PROXIMITY SEARCH The radar icon to the right of the search bar allows you to manipulate keyword proximity. Proximity search technology searches for the keywords you've entered within a targeted range of one another. By searching targeted ranges of words rather than literal phrases, Proximity Search generates more relevant results than a rigid exact match search.



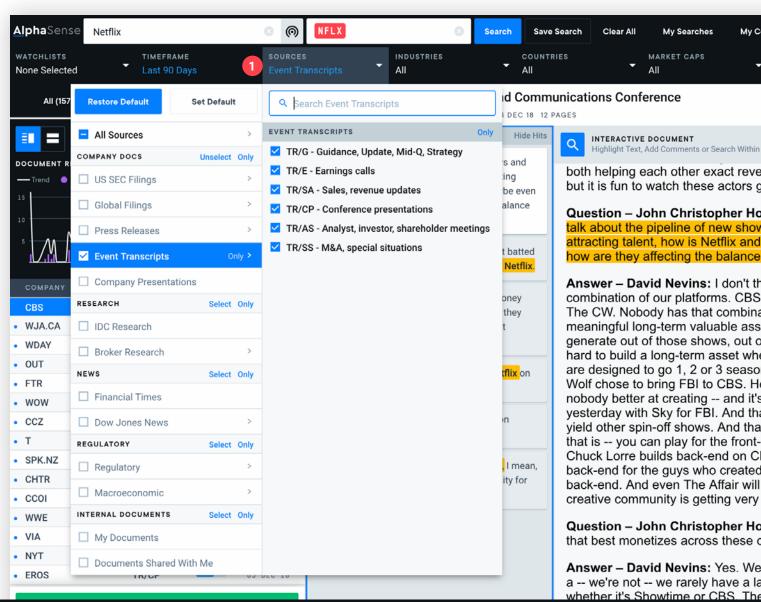


Searching for market chatter

Use AlphaSense to aggregate what the market is saying about a specific company, while excluding documents issued by that company. This workflow sheds light on emerging competitors, offers insight into what partners are doing, and highlights vendor relationships.

Enter the company name in the Keyword search box, and the ticker or company name in the Company/Ticker preceded by a negative sign. For example, -ATT or -Uber. Limit Sources to company documents, such as transcripts, filings, and press releases.

1 SOURCE FILTER To find the most interesting insights, use the Sources filter to search across Event Transcripts only.



Question – John Christopher Ho that best monetizes across these of Answer - David Nevins: Yes. We a -- we're not -- we rarely have a la

My Searches

MARKET CAPS

All

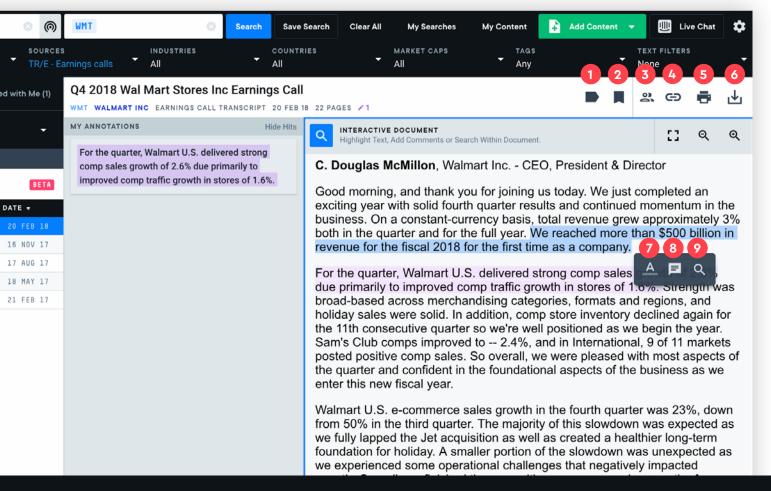


Document Interactivity

Interact with documents in AlphaSense to capture and share insights for future reference and analysis. You can export, annotate and share documents.

- 1 TAGS Create a tag or series of tags to categorize a document. "My Tags" are created by and visible only to you, and "Team Tags" can be created or viewed by you or anyone on your team.
- 2 BOOKMARK Bookmark a document to easily refer to it in the future. Bookmarked documents live under My Content.
- 3 SHARE You can share documents with all users on your team, a default group, a custom group, or nobody.
- 4 DOC LINK Email a link to an AlphaSense document to a colleague, or copy the document link and send it via instant messenger, or other communication channel.
- 5 PRINT Print a document, with or without annotations and/or without keyword hits highlighted.

- 6 EXPORT Download a document, with or without annotations and/or without keyword hits highlighted.
- 7 HIGHLIGHT Select text in a document to highlight it. When there is a keyword match, highlighted text appears at the top of document snippet results.
- 8 ANNOTATE Create a note and make comments on selected text. Annotations are indexed in AlphaSense and appear in search results.
- 9 SEARCH FOR PHRASING Lets you search for the same phrase within the document, within documents from the same company, or across the entire universe of AlphaSense documents.





User Content

Upload your content to AlphaSense for faster research and improved collaboration. Your uploaded content will be indexed to apply Smart Synonyms and proximity search. AlphaSense recognizes and tags mentions of public and private company names in your content.

- 1 UPLOAD DOCS Import up to 25 documents using Upload New Documents – in the Add Content menu. Accepted doc types include PDFs, Microsoft Excel, Word and PowerPoint files.
- 2 FILE SYNC An installed app that lets you to watch folders on your desktop, and sync the contents to AlphaSense. Shared folders and Network drives can be watched for improved cross-team content/ information sharing. Install File Sync from the Add Content menu.
- 3 EVERNOTE Connect to your business or personal Evernote accounts, and index the notes and attachments contained in them to AlphaSense so the content you need can quickly be found and accessed from a central location. Manage from the Add Content menu.

- 4 SHAREPOINT Sync specific sites, subsites, and folders in your SharePoint accounts to AlphaSense. Manage from the Add Content menu.
- 5 WEB CLIPPER "Clip" websites and web PDFs and store the content in AlphaSense so you can find and refer to the information later. Web Clipper is available for Google Chrome (URL: https://chrome.google. com/webstore/detail/alphasense-web-clipper/ odjjihghjdapmcfjhnkkkikiibladmkj)
- 6 EMAIL IN Emails (with or without attachments) can be forwarded directly into your AlphaSense account. Forward the email to MyNotes@alpha-sense.com from the email address associated with your AlphaSense account in order to keep the email private. Forward the email to TeamNotes@alpha-sense.com to share the email with your default group.

