Research Management For Analysts, By Analysts

Finally, there's a research tool that makes analysts — and compliance — happy.

The Sentieo Notebook and Research Management System (RMS) brings together the best features of cloud notebook apps like Evernote and collaboration apps like Google Docs into a system that is tailor–made for equity research analysts and portfolio managers.

◉ CAPTURE & CLASSIFY

Capture notes, highlights, annotations, charts, and more.

- Create notes in a writing environment tailored to your workflow.
- Automatically classify notes based on tickers, tags, authors, note types, and more.
- Investment Thesis Templates help you document ideas by combining your ideas, your firm's data, and Sentieo data.
- Take notes and bring all your research on the road with Sentieo mobile and tablet apps.

Thesis Summary ✎ edit   Done ⚙

Apple is the world's largest information technology company by revenue, the world's largest technology company by total assets,[7] and the world's second-largest mobile phone manufacturer.[8] In November 2014, in addition to being the largest publicly traded corporation in the world by market capitalization, Apple became the first U.S. company to be valued at over US$700 billion.[9] The company employs 115,000 permanent full-time employees as of July 2015[4] and maintains 478 retail stores in seventeen countries as of March 2016.[1] It operates the online Apple Store and iTunes Store, the latter of which is the world's largest music retailer. There are over one billion actively used Apple products worldwide as of March 2016.[10]

Overview ✎ edit

Ticker	AAPL	Recommendation	Buy	% Up / Down	17%
Price	$136.12	Conviction Level	Medium	Next Earnings Date	N/A
Share O/S	5,763M	Timeframe	6 Months	Recommendation	Buy
Market Cap	598,967	Price Target	$160	Owners	NS JD AD AS FM SD

"Before Sentieo, our collaboration was static. From shared document highlighting, note-taking, question management, thesis management, alerts/watchlists, and a centralized portfolio dashboard – our collaboration today is real time and low effort."
-Analyst at Multi-billion Dollar Fund

◎ CENTRALIZE

Centralize broker research, internal content, OneNote/Evernote, Excel models, and more — all in one place for easy retrieval.

- • Access broker research from 500+ research providers.
- • Content is searchable with the same technology that powers Document Search.
- • Sync with existing OneNote/Evernote accounts.
- • Use Web Clipper to capture articles, PDFs, and more.
- • API integration with internal research systems.
- • Upload models and custom data fields via Excel plugin.
- • Move away from shared "S: drives" into an integrated system designed for your workflow.

◎ COLLABORATE

- • Your entire team can share, edit, and comment on content in real time with customized permissions; Sentieo is built around the way your team works together.

CONSUME

Evaluate your research and determine the content most relevant to your investment decisions.

- Keep updated with email notifications and mobile push notifications.
- Access research and notes via Sentieo mobile app on your smartphone or tablet.

COMPLIANCE

- All content changes logged in user–accessible audit trail.
- All notes are easily accessible in a compliance account or downloadable if the firm is audited.
- All content securely encrypted.
- Integrated with existing compliance tools (e.g., GlobalRelay)
- Broker research usage logged for MiFID II compliance.

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