

# 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.

The screenshot displays the AlphaSense search interface. At the top, the search bar contains the keyword "capex" (underlined in yellow) and the ticker "XOM". The interface shows various filters like Watchlists, Timeframe (Last 2 Years), Sources (All), Industries (All), Countries (All), and Market Caps (All). Below the filters, a bar chart titled "DOCUMENT RESULTS OVER TIME (MONTHLY)" shows the trend of documents over time. A table below the chart lists search results for various companies and sources, with "XOM" highlighted. On the right, a snippet from a "Q3 2018 Exxon Mobil Corp Earnings Call" transcript is shown, with "CapEx" highlighted in yellow. The transcript text includes: "Third quarter CapEx was \$6.6 billion.", "CapEx through the first 3 quarters of the year was \$18.1 billion.", "Startup has commenced at our Newport Wales Santoprene specialty elastomer expansion project, with the first production line now in service and the second line planned for startup in next year.", "And then, of course, here in the U.S., continuing to look at Golden Pass with QP, and obviously, very interested in any expansions in the North Field as well.", "And I was just hoping that you might be able to give us where you're at in the process for that second group of 3 expansion projects in the Downstream, have they all reached FID, are they in", "manufacturing on the U.S. Gulf", "million metric ton per year etha", "chemical and refining complex", "Now moving to Slide 4, which", "financial results. Third quarter", "share, up 57% from the prior y", "and asset sales was \$12.6 billi", "from asset sales. Third quarter", "progress investments to supp", "increased activity in the Perm", "acreage in Brazil. CapEx throu", "\$18.1 billion. Now if you exclu", "acreage of about \$1 billion, we", "guidance of approximately \$24", "was \$7.2 billion, more than en", "Debt ended the quarter at \$40", "to the second quarter. And as", "of debt that we had since th

# 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.

**AlphaSense** holiday shopping Search Ticker or Company Search Save Search Clear All My Searches My Con

WATCHLISTS None Selected TIMEFRAME Last 2 Years SOURCES **Broker Research** INDUSTRIES All COUNTRIES All MARKET CAPS All

All (998) My Content (0) Shared with Me (6)

View by Company (299) Export

**DOCUMENT RESULTS OVER TIME (MONTHLY)**

Trend Research

COMPANY	SOURCE	SCORE	DATE
Cons Disc	R/WEDB		27 NOV 18
• Cons Disc	R/WEDB		16 NOV 18
<b>BJ</b>	<b>R/CITI</b>		<b>23 NOV 18</b>
• Cons Disc	R/MS		26 NOV 18
• GPS	R/KEY		25 NOV 18
• Cons Disc	R/WEDB		26 NOV 18
• Info Tech	R/COW		26 NOV 18
• Cons Disc	R/TLY		26 NOV 18
• Cons Disc	R/JEFF		16 NOV 18
• Cons Disc	R/MS		31 OCT 18
• Info Tech	R/JMP		21 NOV 18
• Cons Disc	R/DB		06 DEC 18
• Industry	R/BARC		26 NOV 18

**2018 Black Friday Retail Checks: Gobbling Up Turkey & Deals, A Thanksgiving/Black Friday**

BJ BJ'S WHOLESALE CLUB HOLDINGS INC CITI - KATE MCSHANE 23 NOV 18 33 PAGES

KEYWORD HITS Hide Hits

TITLE HIT

2018 **Black Friday** Retail Checks Gobbling Up Turkey & Deals, A **Thanksgiving/Black Friday**

4) Toy Promotions - There was a noticeable expansion in toy offerings among retailers in keeping with their preannounced plans to capitalize on the **Holiday season**, with WMT and TGT running distinct promotions.

**Black Friday** 2018 Checks - We visited various retailers (broadlines, consumer electronics, home furnishings, sporting goods, and apparel & footwear) on Thanksgiving night (Thursday, November 22) and the morning of **Black Friday** (BF) to assess holiday offerings, promotions and traffic.

With **Black Friday** sales being pulled forward to November (and earlier) and promos being well telegraphed, consumers have caught on and aren't waiting to go out during the weekend.

2018 **Black Friday** Retail Checks

**INTERACTIVE DOCUMENT**  
Highlight Text, Add Comments or Search

citi

23 Nov 2018 13:54:41 ET | 33 pages

**2018 Black Friday Retail Checks: Gobbling Up Turkey & Deals, A Thanksgiving Special**

**Key Takeaways** — Overall, store openings appear number of chains closed on Thanksgiving vs. last year appeared slightly lower y/y, with select doorbusters.

**Consumer Electronics** — Very large TVs seemed to be the most popular category, with some retailers saw roughly similar offers for free shipping and retail expansions from third parties. 3) **Promotional Levels Than Last Year** — The number of doorbusters at the level of markdown stayed the same at around 10% less CE SKUs on sale with less of markdown than marketplace and cleaned up inventory likely drove.

**Promotions** — There was a noticeable expansion in keeping with their preannounced plans to capitalize on and TGT running distinct promotions. 5) **Footwear** promotions, but mixed traffic in both Dick's footwear.

**Black Friday 2018 Checks** — We visited various electronics, home furnishings, sporting goods, Thanksgiving night (Thursday, November 22) and to assess holiday offerings, promotions and traffic. analysis of markdown levels, promotional deals, and what it was when we started covering the group 1 sales being pulled forward to November (and earlier) telegraphed, consumers have caught on and are weekend. We note a few years ago when stores there was a novelty to that and an "after-party"-like evening that might have incentivized those to shop that too has become hackneyed (although the Thanksgiving night this year). Therefore, we see event and more as a wrap-up of an already-busy N

**Solid Traffic at BBY and WMT Despite Increased Competition** — Most big box retailers opened their doors on Th

# 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.

The screenshot displays the AlphaSense search interface. The search bar contains 'medtech growth'. A 'KEYWORD PROXIMITY' slider is set to 'Within 15 words'. The 'INDUSTRIES' filter is set to 'Health Care'. The search results are displayed in a table with columns: COMPANY, SOURCE, SCORE, and DATE.

COMPANY	SOURCE	SCORE	DATE
Health Care	R/WELS	—	12 DEC 18
• SYK	R/UBS	—	27 NOV 18
• Health Care	R/MS	—	10 DEC 18
• VAR	R/GS	—	30 NOV 18
• Health Care	R/DB	—	07 DEC 18
• Health Care	R/PIPR	—	18 DEC 18
• AFX.DE	ARS	—	07 DEC 18
• WMGI	R/NEED	—	19 SEP 18
• WMGI	R/NEED	—	28 NOV 18
• Health Care	R/BMO	—	10 DEC 18
• WDH.DK	R/UBS	—	10 DEC 18
• Health Care	R/RBC	—	30 NOV 18
• INSP	R/LEER	—	29 OCT 18
• COLO B.DK	R/BARC	—	26 NOV 18
• ABT	R/CS	—	17 DEC 18

The search results also include a 'The MedTech Manual - 2019 Outlook' document. The document text highlights 'medtech growth' and 'organic growth' as key themes. The document is dated December 12, 2018, and is by Equity Research.

**The MedTech Manual – 2019 Outlook**  
**Virtuous Cycle Of Innovation Leads To A New Future**

**Summary.** Over the past few years, the organic medtech sector has accelerated from about 2.4% in 2013 to almost 6% in 2018, and this has helped the medical device sector outperform the S&P 500 YTD 2018.

The recent strength in medtech growth has been driven by enhanced innovation and strong growth in emerging markets, in our view.

We do see EPS growth slowing in 2019, mainly due to (1) currency moving from a tailwind in 2018 to a headwind in 2019 and (2) the lapping of tax reform, which boosted EPS growth in 2018.

Although medtech valuations are at 10-year highs on an absolute and relative basis, we believe investors should focus more on pre-2008 levels instead of post-2008 levels because the fundamentals of the sector are more similar to the pre-2008 period than the period between 2008 and 2014.

So far in 2018, the S&P Pharmaceutical index is down 5.8%, the NASDAQ Biotech index is down 2.4%, and the S&P Healthcare Services index is up.

Exhibit 1. YTD 2018 Medtech Stock Performance vs. S&P 500 and Other Healthcare Sectors



# 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.

The screenshot displays the AlphaSense search interface. At the top, the search bar contains 'Netflix' and the ticker 'NFLX'. The 'SOURCES' filter is set to 'Event Transcripts'. The 'COMPANY DOCS' filter is also selected, showing a list of document types including 'US SEC Filings', 'Global Filings', 'Press Releases', 'Event Transcripts', 'Company Presentations', 'IDC Research', 'Broker Research', 'Financial Times', 'Dow Jones News', 'Regulatory', 'Macroeconomic', 'My Documents', and 'Documents Shared With Me'. The 'EVENT TRANSCRIPTS' section is expanded, showing a list of transcripts such as 'TR/G - Guidance, Update, Mid-Q, Strategy', 'TR/E - Earnings calls', 'TR/SA - Sales, revenue updates', 'TR/CP - Conference presentations', 'TR/AS - Analyst, investor, shareholder meetings', and 'TR/SS - M&A, special situations'. The 'INTERACTIVE DOCUMENT' section on the right shows a snippet of text from a document titled 'Netflix Communications Conference'.

# 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.

The screenshot displays the AlphaSense interface for a document titled "Q4 2018 Wal Mart Stores Inc Earnings Call". The interface includes a top navigation bar with search and document management tools. A sidebar on the left shows filters for sources, industries, countries, market caps, tags, and text filters. The main content area displays the document text with annotations and highlights. Red numbered callouts (1-9) indicate specific interactive features: 1. Search, 2. Save Search, 3. Clear All, 4. My Searches, 5. My Content, 6. Add Content, 7. Highlight Text, 8. Add Comments, 9. Search Within Document.

**1** Search

**2** Save Search

**3** Clear All

**4** My Searches

**5** My Content

**6** Add Content

**7** Highlight Text

**8** Add Comments

**9** Search Within Document

Q4 2018 Wal Mart Stores Inc Earnings Call

WMT WALMART INC EARNINGS CALL TRANSCRIPT 20 FEB 18 22 PAGES

MY ANNOTATIONS Hide Hits

For the quarter, Walmart U.S. delivered strong comp sales growth of 2.6% due primarily to improved comp traffic growth in stores of 1.6%.

**INTERACTIVE DOCUMENT**  
Highlight Text, Add Comments or Search Within Document.

**C. Douglas McMillon, Walmart Inc. - CEO, President & Director**

Good morning, and thank you for joining us today. We just completed an exciting year with solid fourth quarter results and continued momentum in the business. On a constant-currency basis, total revenue grew approximately 3% both in the quarter and for the full year. We reached more than \$500 billion in revenue for the fiscal 2018 for the first time as a company.

For the quarter, Walmart U.S. delivered strong comp sales due primarily to improved comp traffic growth in stores of 1.6%. Strength was broad-based across merchandising categories, formats and regions, and holiday sales were solid. In addition, comp store inventory declined again for the 11th consecutive quarter so we're well positioned as we begin the year. Sam's Club comps improved to -- 2.4%, and in International, 9 of 11 markets posted positive comp sales. So overall, we were pleased with most aspects of the quarter and confident in the foundational aspects of the business as we enter this new fiscal year.

Walmart U.S. e-commerce sales growth in the fourth quarter was 23%, down from 50% in the third quarter. The majority of this slowdown was expected as we fully lapped the Jet acquisition as well as created a healthier long-term foundation for holiday. A smaller portion of the slowdown was unexpected as we experienced some operational challenges that negatively impacted

# 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/odjjihghjdapmcfjhnkkikiibladmkj>)

**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.

