

Research Management For Analysts, By Analysts

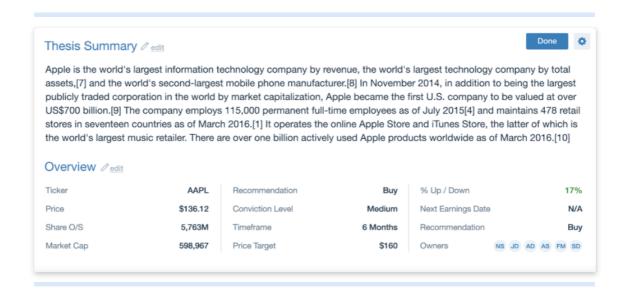
Finally, there's a research tool that makes analysts — and compliance — happy.

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.



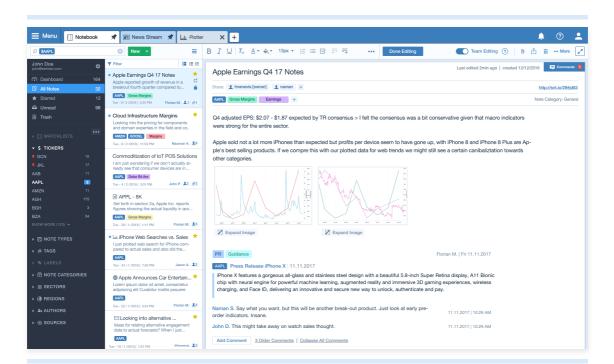
[&]quot;Before Sentieo, our collaboration was static. From shared document highlighting, notetaking, question management, thesis management, alerts/watchlists, and a centralized portfolio dashboard – our collaboration today is real time and low effort."

-Analyst at Multi-billion Dollar Fund

CENTRALIZE

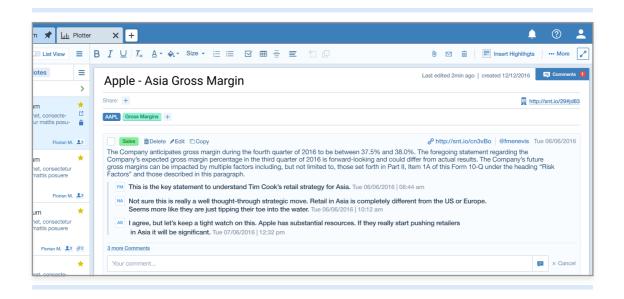
Centralize broker research, internal content, OneNote/Evernote, Excel models, and more — all in one place for easy retrieval.

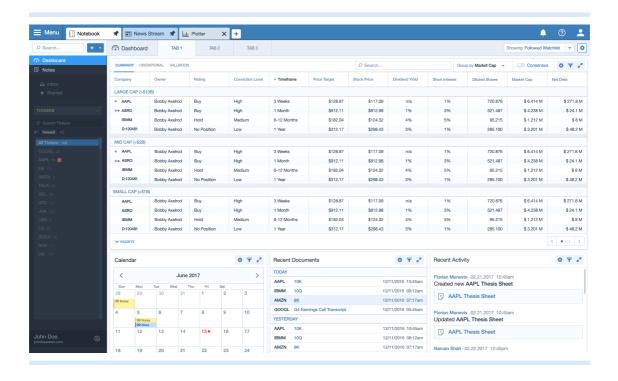
- Access broker research from 500+ research providers.
- Content is searchable with the same technology that powers Document Search.
- Sync with existing OneNote/Evernote accounts.
- Use Web Clipper to capture articles, PDFs, and more.
- API integration with internal research systems.
- Upload models 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.







