San Francisco

AI Search & Machine Learning Powered Research

Speakers

Mat Connorton

Application Specialist

Umut Topkara, PhD

Head of AI Research & News
Bloomberg Engineering

Louis Bellamacina

Product Manager

Spend less time acquiring content

Get up to speed with companies faster

Identify emerging themes

Agenda

Bloomberg's New Document Research Platform

- Insights from Unstructured Data
- How to Use the Platform
- New AI Analytics

AI@Bloomberg

- Bloomberg AI and Research
- How We Build AI Products
- Strategic Investments & Where We're Headed

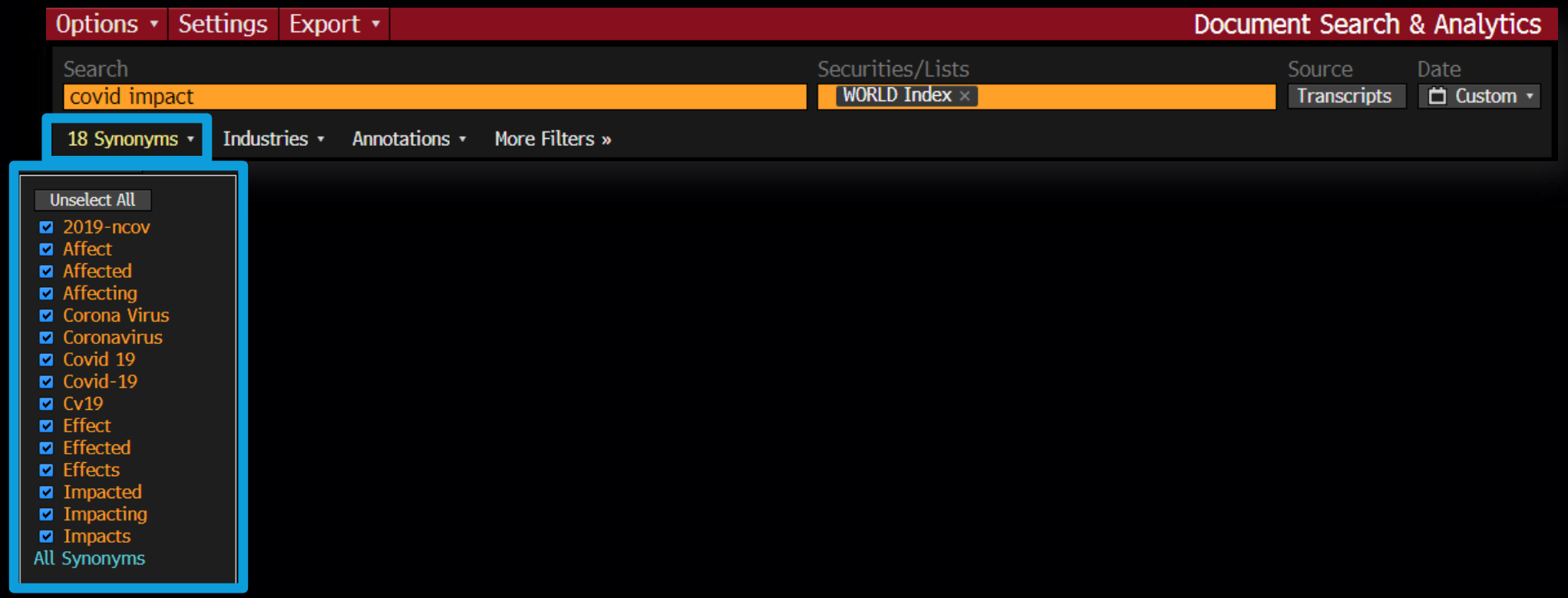
Search in the context of our whole investment platform

- Case Study: Integrating Document Search, Earnings, and MODL <GO>
- Company Financials Platform
- xx

Insights from Unstructured Data

Unstructured data allows us to derive all kinds of insights

Unstructured data: Covid Impact



Unstructured data: Covid Impact

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search: covid impact

Securities/Lists: WORLD Index ×

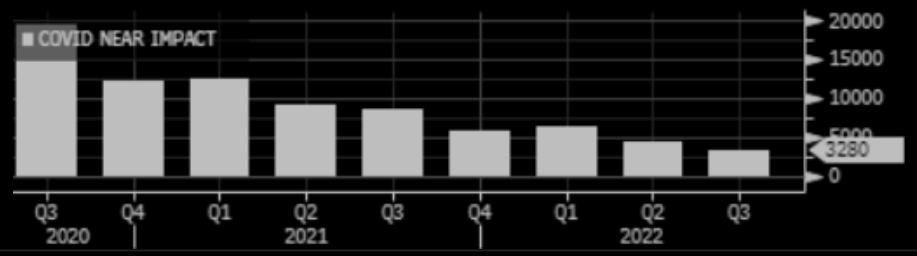
Source: Transcripts

Date: Custom ▾

18 Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

Trends | More Trends »

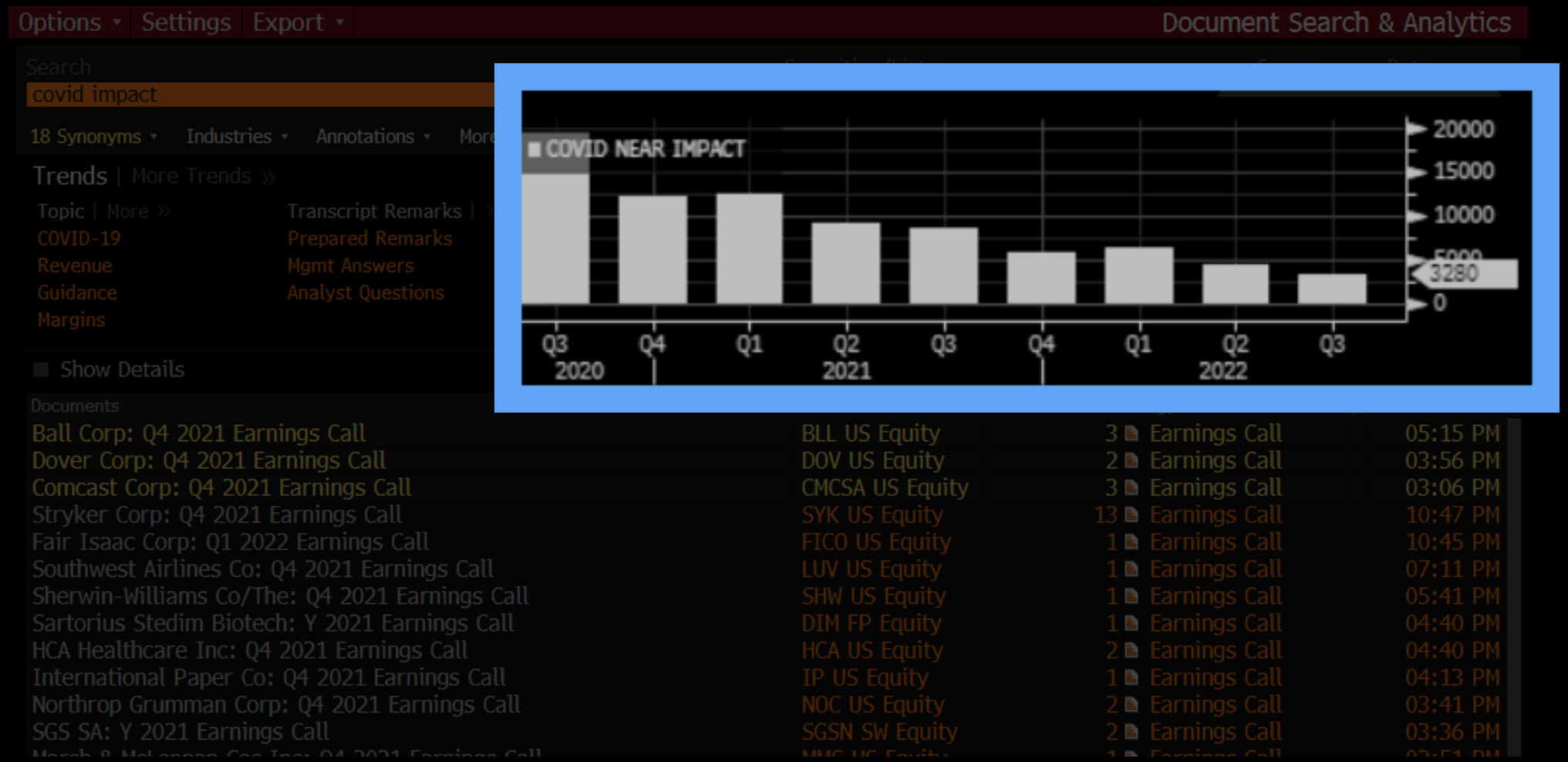
Topic | More »	Transcript Remarks | »	Securities | More »
COVID-19	Prepared Remarks	Boston Scientific Corp
Revenue	Mgmt Answers	Becton Dickinson and …
Guidance	Analyst Questions	Amgen Inc
Margins		BioMarin Pharmaceutic…



Show Details

Documents	Securities	Matches	Type	Time
Ball Corp: Q4 2021 Earnings Call	BLL US Equity	3	Earnings Call	05:15 PM
Dover Corp: Q4 2021 Earnings Call	DOV US Equity	2	Earnings Call	03:56 PM
Comcast Corp: Q4 2021 Earnings Call	CMCSA US Equity	3	Earnings Call	03:06 PM
Stryker Corp: Q4 2021 Earnings Call	SYK US Equity	13	Earnings Call	10:47 PM
Fair Isaac Corp: Q1 2022 Earnings Call	FICO US Equity	1	Earnings Call	10:45 PM
Southwest Airlines Co: Q4 2021 Earnings Call	LUV US Equity	1	Earnings Call	07:11 PM
Sherwin-Williams Co/The: Q4 2021 Earnings Call	SHW US Equity	1	Earnings Call	05:41 PM
Sartorius Stedim Biotech: Y 2021 Earnings Call	DIM FP Equity	1	Earnings Call	04:40 PM
HCA Healthcare Inc: Q4 2021 Earnings Call	HCA US Equity	2	Earnings Call	04:40 PM
International Paper Co: Q4 2021 Earnings Call	IP US Equity	1	Earnings Call	04:13 PM
Northrop Grumman Corp: Q4 2021 Earnings Call	NOC US Equity	2	Earnings Call	03:41 PM
SGS SA: Y 2021 Earnings Call	SGSN SW Equity	2	Earnings Call	03:36 PM

Zoom: Covid Impact



Not All Industries Have Recovered

Unstructured data allows us to derive all kinds of insights

Unstructured Data: Supply Chain Disruption

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search: supply chain near disruption

Securities/Lists: WORLD Index ×

Source: Transcripts

Date: Last 5 Years ▾

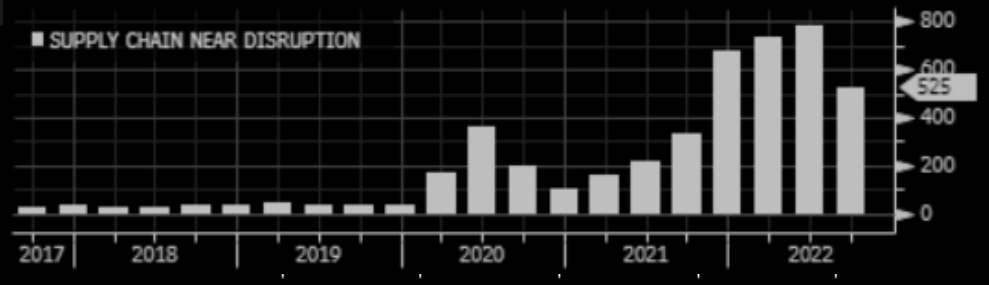
13 Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

Unselect All

- ☑ Disrupting
- ☑ Disruptive
- ☑ Disruptors
- ☑ Distribution Centers
- ☑ Distribution Network
- ☑ Factories
- ☑ Factory
- ☑ Manufacturing
- ☑ Manufacturing Facilities
- ☑ Manufacturing Footprint
- ☑ Manufacturing Plants
- ☑ Manufacturing Sites
- ☑ Supply Chains

Transcript Remarks | »
Prepared Remarks
Mgmt Answers
Analyst Questions

Securities | More »
3M Co
HP Inc
Aptiv PLC
International Flavors &...



Zoom: Supply Chain Disruption

Options ▾ Settings Export ▾ Document Search & Analytics

Search: supply chain near disruption

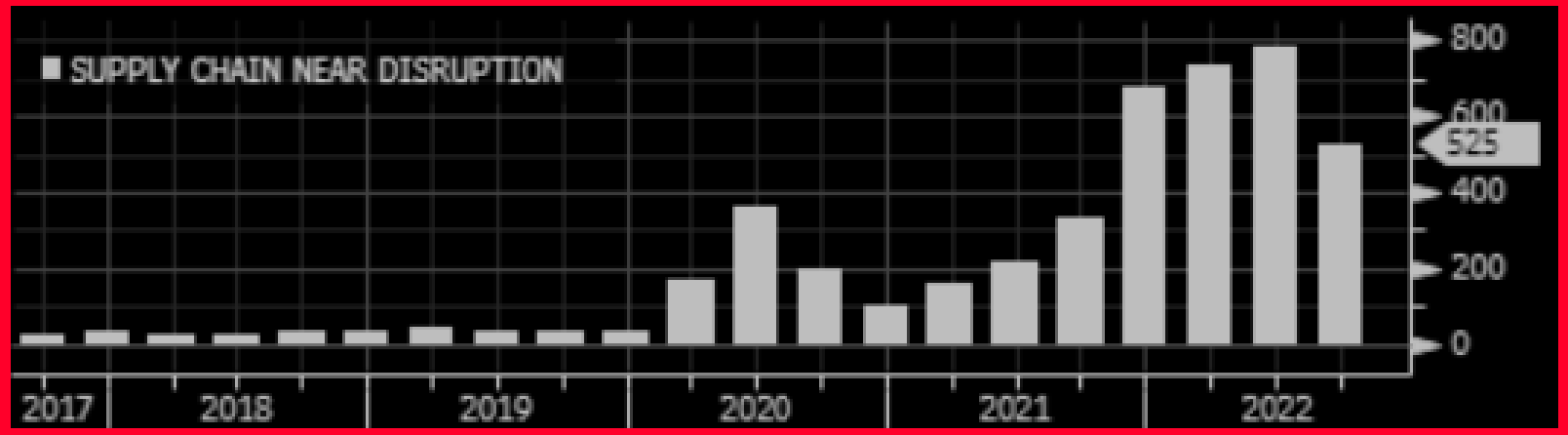
13 Synonyms ▾ Industries ▾ Annotation

Trends | More Trends »

Topic | More »
Supply Chain
Supply Chain Disruptio...
Guidance
Revenue

Transcript Re
Prepared Rer
Mgmt Answer
Analyst Quest

Show Details



Documents

Securities/Lists	Source	Date
Tractor Supply Co: Q4 2021 Earnings		
McCormick & Co Inc/MD: Q4 2021 Earnings Call	MKC US Equity	3 Earnings Call 02:22 PM
DWS Group GmbH & Co KGaA: Y 2021 Earnings Call	DWS GR Equity	1 Earnings Call 11:33 AM
Western Digital Corp: Q2 2022 Earnings Call	WDC US Equity	5 Earnings Call 11:11 PM
KLA Corp: Q2 2022 Earnings Call	KLAC US Equity	1 Earnings Call 11:08 PM
Stryker Corp: Q4 2021 Earnings Call	SYK US Equity	2 Earnings Call 10:47 PM
United Rentals Inc: Q4 2021 Earnings Call	URI US Equity	1 Earnings Call 05:41 PM
Ball Corp: Q4 2021 Earnings Call	BLL US Equity	2 Earnings Call 05:15 PM
A O Smith Corp: Q4 2021 Earnings Call	AOS US Equity	1 Earnings Call 04:45 PM
Rockwell Automation Inc: Q1 2022 Earnings Call	ROK US Equity	1 Earnings Call 03:25 PM
MKS Instruments Inc: Q4 2021 Earnings Call	MKSI US Equity	1 Earnings Call 02:50 PM
SAP SE: Y 2021 Earnings Call	SAP GR Equity	1 Earnings Call 02:43 PM
Deutsche Bank AG: Y 2021 Earnings Call	DBK GR Equity	1 Earnings Call 02:23 PM

Solutions

Unstructured data allows us to derive all kinds of insights

Unstructured Data: Inflation

Options | Settings | Export | Document Search & Analytics

Search: inflation

Securities/Lists: WORLD Index

Source: Transcripts

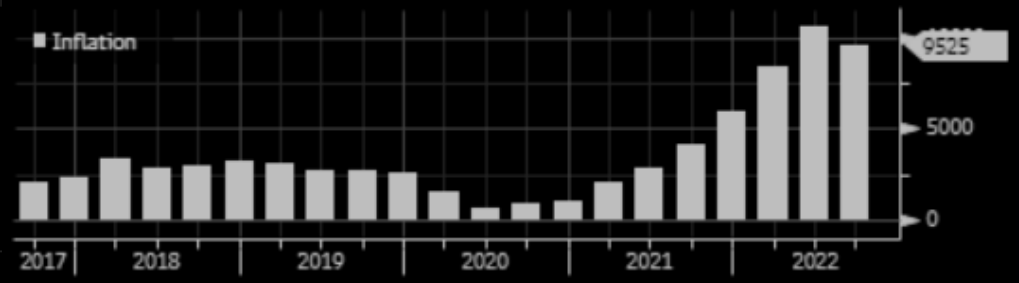
Date: Custom

10 Synonyms | Industries | Annotations | More Filters »

Unselect All
- Consumer Price
- Consumer Price Index
- Consumer Prices
- Cpi
- Infl
- Inflationary
- Prices Rise
- Prices Rising
- Rise In Prices
- Rising Prices

Transcript Remarks | »
- Mgmt Answers
- Prepared Remarks
- Analyst Questions

Securities | More »
- Union Pacific Corp
- Costco Wholesale Corp
- Cardinal Health Inc
- Canadian National Rail...



But it does feel and this is an amalgamation of data points that makes a portfolio plus what's going on in the environment, whether it's the **inflationary** trends, moratorium, supply chain bottlenecks that, that leverage is shifting back and literally just in the last 24 hours, we are updating our pricing

Delta Air Lines Inc: Capital Markets Day — Shareholder Mtg ... — 12/16/21

Ed Bastian	But we also know that, you're worried about **inflation**, you're worried about what's going to happening on interest course, you're worried about the volatility and feel, you're worried about the fact our industry has more supply than demand right now and we get that and we factor all of that into the equation
Ed Bastian	We'll talk about fuel cost excluding on fuel cost and we'll go through that continuing to drop, by '24 we expect to get our non fuel costs down to single digits, and that's with **inflation** assumptions and labor cost escalation embedded within those assumptions.
Glen Hauenstein	I mean, in this sense, if you're looking at **inflation** rate, we haven't seen in a very-very long period of time, it's impacting those on the lower income scale, much more obviously than those of us that can manage that.

Zoom: Five Year Inflation Trend

Options | Settings | Export | Document Search & Analytics

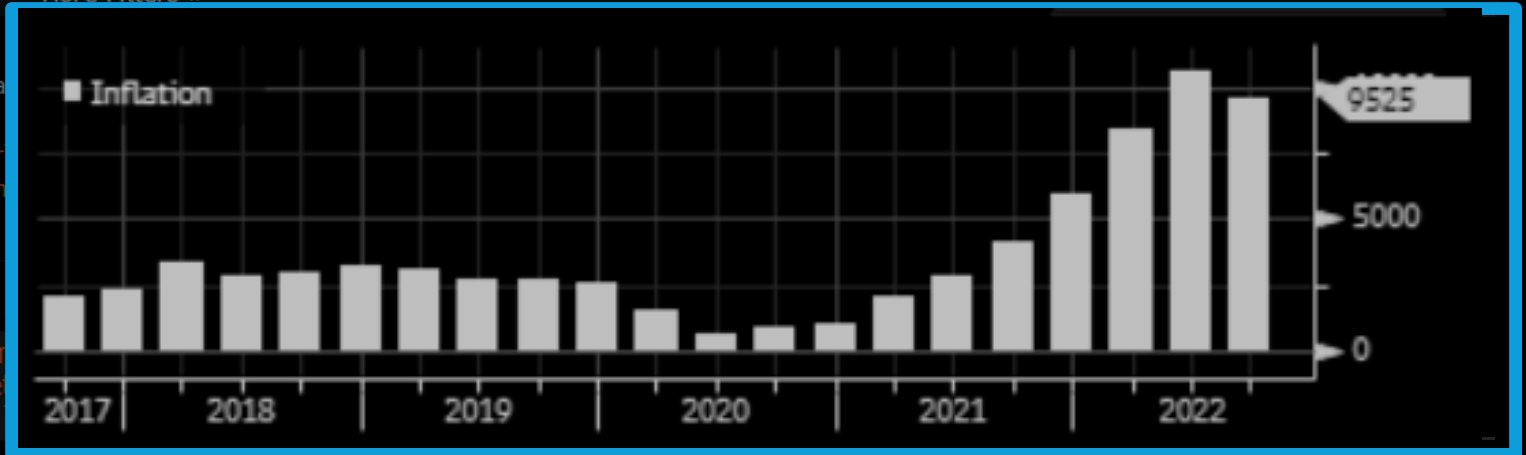
Search: inflation | Securities/Lists: WORLD Index | Source: Transcripts | Date: Custom

10 Synonyms | Industries | Annotations | More Filters »

Unselect All
- Consumer Price
- Consumer Price Index
- Consumer Prices
- Cpi
- Infl
- Inflationary
- Prices Rise
- Prices Rising
- Rise In Prices
- Rising Prices

Transcript Rema
Mgmt Answers
Prepared Remar
Analyst Question

But it does feel ar
environment, whe
shifting back and

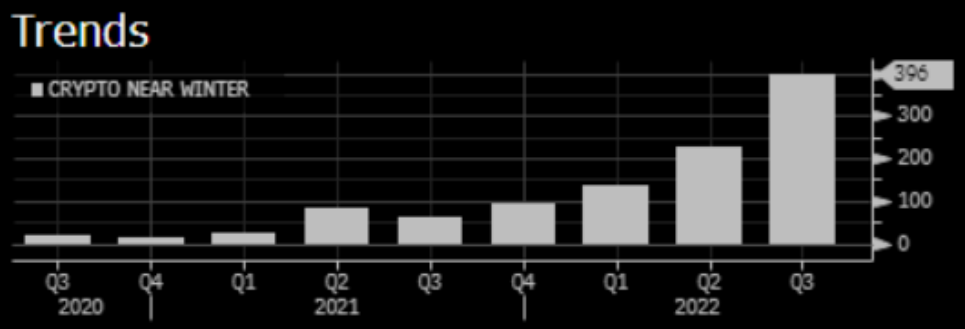


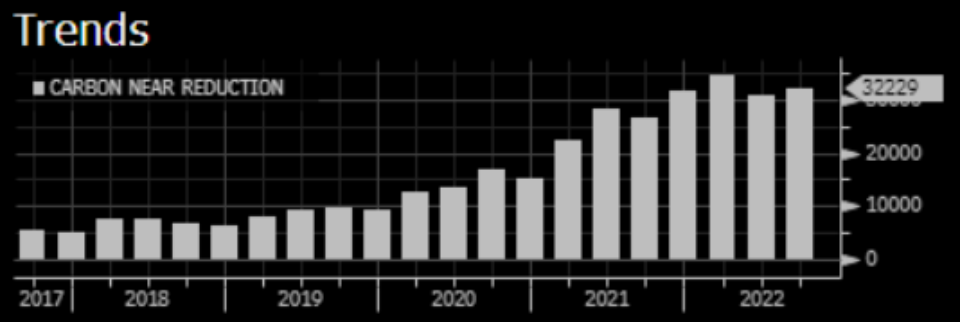
Delta Air Lines Inc: Capital Markets Day — Shareholder Mtg ... 12/16/21

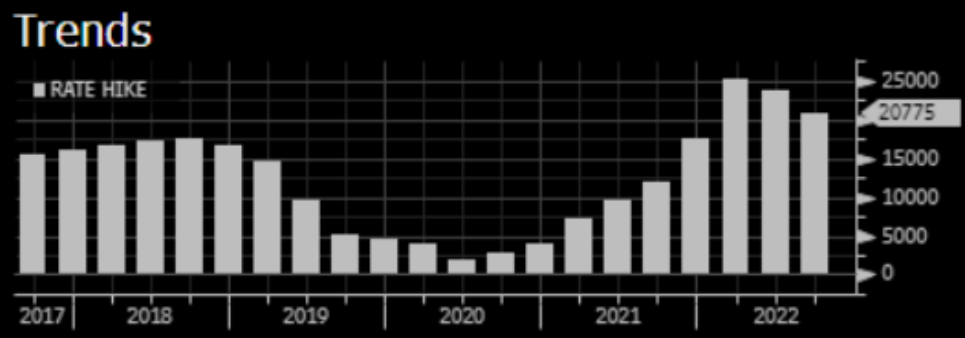
Ed Bastian	But we also know that, you're worried about **inflation**, you're worried about what's going to happening on interest course, you're worried about the volatility and feel, you're worried about the fact our industry has more supply than demand right now and we get that and we factor all of that into the equation
Ed Bastian	We'll talk about fuel cost excluding on fuel cost and we'll go through that continuing to drop, by '24 we expect to get our non fuel costs down to single digits, and that's with **inflation** assumptions and labor cost escalation embedded within those assumptions.
Glen Hauenstein	I mean, in this sense, if you're looking at **inflation** rate, we haven't seen in a very-very long period of time, it's impacting those on the lower income scale, much more obviously than those of us that can manage that.

Top Searches Globally Sep

1. Inflation
2. ESG
3. China
4. Dividend
5. Capex







How to Use the Platform

DS Document Search

MENU | OUT | Team | Other | Time Z | MMM | ARAP | New D | Jira | Factse | RESM | DRQS | FTAM | bweb | BLP | Hub | QATE | QADM | CMPN | ZOOM

MICROSOFT CORP Equity | DS | Related Functions Menu | Message

Options | Settings | Export | Document Search & Analytics

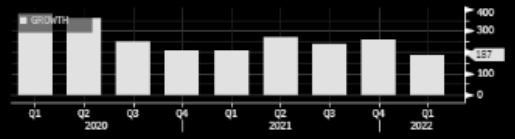
Search: growth | Securities/Lists: SHELL NA Equity | Source: Recommended | Date: All Dates

7 Synonyms | Filings | Industries | Annotations | Page Count | More Filters »

Trends

Last 24 Months

Providers | More »	Securities | More »	Filings | More »
Trading Central	Shell PLC	6-K
MSCI	TotalEnergies SE	ESG Releases
Morningstar	BP PLC	Quarterly Report
Barclays	Eni SpA	Supplement



Show Details

Documents	Matches	Type	Page	Date
Shell PLC: Finl Press Release 2022/02/03	1	Finl Press Release		02/03/22
Shell PLC: Y 2021 Earnings Call	8	Earnings Call		02/03/22
CFRA Marketscope: SHEL LN Stock Report	11	CFRA	9	02/26/22
Benelux Morning Notes	9	ING Wholesale Ba...	10	08:21 AM
Shell Plc : Exit Gazprom partnerships	11	Oddo Securities	4	07:25 AM
Shell | 1K | Buy | Exiting Russia the right thing to do	33	Kepler Cheuvreux	14	07:02 AM
Shell Plc : Financial highlights	7	BNP Paribas Exane	1	06:28 AM
Shell Plc : Financial highlights	7	BNP Paribas Exane		05:11 AM
Oil & Gas Weekly Monitor	12	Societe Generale	14	02/28/22
Shell Plc (Buy, TP=2350p) - Corporate news - Shell announces exit from Russi...	4	Societe Generale	5	02/28/22
Morningstar | Shell Joins Russian Exodus; Our Fair Value Estimate Is Unchange...	22	Morningstar	12	02/28/22
Morningstar | Shell Joins Russian Exodus; Our Fair Value Estimate Is Unchange...	22	Morningstar	12	02/28/22
Morningstar | Who's Next? Equinor Joins BP in Exiting Russia; Total as Most Ex...	22	Morningstar	13	02/28/22
Morningstar | Who's Next? Equinor Joins BP in Exiting Russia; Total as Most Ex...	22	Morningstar	13	02/28/22
European Oil & Gas: Big Oil to Big Energy via Offshore Wind: Shell and TTE suc...	2	BofA Securities	7	02/28/22
CFRA Marketscope: SHEL Stock Report	11	CFRA	9	02/27/22
Morningstar | Integrated Oils Russia Risk Low; Total and BP Most Exposed, Ch...	25	Morningstar	14	02/24/22
Morningstar | Integrated Oils Russia Risk Low; Total and BP Most Exposed, Ch...	25	Morningstar	14	02/24/22
Morningstar | What the Invasion of Ukraine Means for European Stocks	22	Morningstar	13	02/24/22
Morningstar | What the Invasion of Ukraine Means for European Stocks	22	Morningstar	13	02/24/22
Morningstar | What the Invasion of Ukraine Means for European Stocks	22	Morningstar	13	02/24/22
EU Oils: Taking Stock: Energy complex not 'just a play' on oil risk premium; O...	76	JP Morgan	31	02/24/22
The Weekly Burn – SHEL's 2022 LNG Outlook	10	Wolfe Research	12	02/23/22
Morningstar | Halting Nord Stream 2 Certification Lacks Teeth as the U.S. Enac...	24	Morningstar	14	02/23/22
European Integrated Oils: Three charts which show The Good, The Bad & The U...	20	Daiwa Securities ...	22	02/23/22
SHEL Lng Outlook: Tight Market Gets Tighter Beyond 2025	13	Cowen	13	02/22/22
SHEL-N: Bullish Global LNG Outlook; LNG Cda First Cargo Still Mid-Decade	3	TD Securities	4	02/22/22
Shell Is One of the Largest Beneficiaries of A Bright LNG Outlook	22	Scotiabank	29	02/22/22
Shell Plc : LNG market leader not yet rewarded for its FCF strength	13	Oddo Securities	4	02/22/22
Shell "Global LNG outlook: tighter market, stronger position" (Buy) Patricot: ...	16	UBS	20	02/21/22
Shell Plc: LNG outlook - an important transitional fuel	6	Barclays	10	02/21/22
Shell - LNG market squeeze to continue	1	RBC Capital	1	02/21/22
Oil & Gas Weekly Monitor	13	Societe Generale	14	02/21/22
Majors set for gradual recovery in FIDs with more subsea tiebacks planned	1	Rystad Energy	4	02/21/22
$80 oil for FY22 (Shell)	6	Baader Helvea	5	02/21/22
$80 oil for FY22 (Shell)	7	AlphaValue/Baad...	2	02/21/22

Suggested Functions | EQS Screen for companies to generate ideas | GMM Scan the biggest global market moves

DOCV Document Viewer

History | Shell Plc : Exit Gazprom partners... | Morningstar | Shell Joins Russia...

((GROWTH=) OR (CHANGE) OR ("GROWTH R 1/22 | 2 Attachments | Share Annotations

Sidebar | Comment | Highlight | Pen | Actions | 2/12 | Automatic Zo...

Subscribe

Home | Search | Annotations

Morningstar | Shell Joins Russian Exo... (24)

investment advice; are provided solely for informational purposes and therefore are not an offer to buy or sell a security; and are not warranted to be correct, complete or accurate. The opinions expressed are as of the date written and are subject to change without notice.

Highlight

are likely to be receptive to the decision. Shell reiterated its strategy and financial framework, including dividend growth and intent to return 20%-30% of operating cash flow to shareholders. 1 2

Highlight

investment advice; are provided solely for informational purposes and therefore are not an offer to buy or sell a security; and are not warranted to be correct, complete or accurate. The opinions expressed are as of the date written and are subject to change without notice.

Highlight

23.85 EUR 23.00 EUR High None Stable Standard Oil & Gas Shell PLC SHELL (XAMS) | QQQ ESG Risk Rating Assessment² ::::: Growth (% YoY) 3-Year Hist. CAGR 2018 2019 2020 2021 2022 5-Year Proj. CAGR

Highlight

Pre-Tax Cost of Debt % 6.5 Weighted Average Cost of Capital % 7.5 Long-Run Tax Rate % 27.5 Stage II EBI Growth Rate % 3.5 Stage II Investment Rate % 23.3 Perpetuity Year 6 USD Mil Firm Value (%)

Highlight

investment advice; are provided solely for informational purposes and therefore are not an offer to buy or sell a security; and are not warranted to be correct, complete or accurate. The opinions expressed are as of the date written and are subject to change without notice.

Highlight

investment advice; are provided solely for informational purposes and therefore are not an offer to buy or sell a security; and are not warranted to be correct, complete or accurate. The opinions expressed are as of the date written and are subject to change without notice.

Highlight

investment advice; are provided solely for informational purposes and therefore are not an offer to buy or sell a security; and are not warranted to be correct, complete or accurate. The opinions expressed are as of the date written and are subject to change without notice.

Highlight

(Increase) Decrease in Inventory – – – – – Change in Other Short-Term Assets – – – – – Increase (Decrease) in Accounts Payable 3,442 -4,779 4,610 – – Change in Other Short-Term Liabilities – – – – –

Highlight

MORNINGSTAR

Shell PLC SHELL (XAMS) | ★★★

Last Price	Fair Value	Uncertainty	Economic Moat™	Moat Trend™	Capital Allocation	Industry Group	ESG Risk Rating Assessment²
23.85 EUR	23.00 EUR	High	None	Stable	Standard	Oil & Gas	

Morningstar Analyst Forecasts

Financial Summary and Forecasts

Fiscal Year Ends in December

Growth (% YoY)	5-Year Hist. CAGR	2018	2019	2020	2021	2022	5-Year Proj. CAGR
Revenue	-16.3	27.2	-11.2	-40.0	68.1	28.6	14.0
EBIT	-201.1	77.6	-23.4	-175.8	-217.1	31.7	—
EBITDA	-15.7	27.1	-4.3	-49.8	68.3	14.5	12.0
Net Income	-218.7	80.0	-32.2	-236.9	-174.2	37.0	—
Diluted EPS	-221.2	78.9	-30.2	-242.4	-174.2	35.6	—
Earnings Before Interest, after Tax	-211.8	108.4	-29.4	-194.9	-191.7	27.0	—
Free Cash Flow	-4.5	34.6	22.7	-16.3	2.5	8.6	3.2

Profitability	5-Year Hist. Avg	2018	2019	2020	2021	2022	5-Year Proj. Avg
Operating Margin %	2.0	9.9	8.6	-12.5	8.7	9.1	8.1
EBITDA Margin %	18.1	15.5	16.7	16.1	17.3	15.7	15.6
Net Margin %	-0.5	5.9	4.5	-11.8	5.2	5.4	4.9
Free Cash Flow Margin %	10.7	9.3	8.1	13.1	8.0	6.9	6.3
ROIC %	2.8	9.1	7.1	-4.8	6.8	9.0	7.5
Adjusted ROIC %	4.0	9.5	7.4	-4.9	6.8	9.0	7.5
Return on Assets %	1.4	5.8	3.9	-5.5	4.3	5.6	4.6
Return on Equity %	2.5	11.9	8.2	-12.7	10.0	12.4	10.0

Leverage	5-Year Hist. Avg	2018	2019	2020	2021	2022	5-Year Proj. Avg
Debt/Capital	0.34	0.28	0.34	0.41	0.37	0.36	0.35
Total Debt/EBITDA	2.18	1.25	1.64	3.85	1.81	1.58	1.74
EBITDA/Interest Expense	12.07	16.42	12.56	7.23	16.29	18.56	16.70

Valuation Summary and Forecasts

	2019	2020	2021(E)	2022(E)
Price/Fair Value	0.75	0.60	—	—
Price/Earnings	15.1	NM	12.9	9.5
EV/EBITDA	3.5	4.9	4.7	4.1
EV/EBIT	6.8	NM	9.2	7.1
Free Cash Flow Yield %	14.6	24.3	11.8	12.7
Dividend Yield %	6.4	3.6	7.6	7.7

Key Valuation Drivers

Cost of Equity %	9.0
Pre-Tax Cost of Debt %	6.5
Weighted Average Cost of Capital %	7.5
Long-Run Tax Rate %	27.5
Stage II EBI Growth Rate %	3.5
Stage II Investment Rate %	23.3
Perpetuity Year	6

Additional estimates and scenarios available for download at http://select.morningstar.com.

Discounted Cash Flow Valuation

	USD Mil	Firm Value (%)	Per Share Value
Present Value Stage I	91,966	33.9	11.82
Present Value Stage II	9,391	3.5	1.21
Present Value Stage III	170,009	62.6	21.86
Total Firm Value	**271,365**	**100.0**	**34.89**
Cash and Equivalents	31,830	—	4.09
Debt	-108,014	—	-13.89
Preferred Stock	—	—	—
Other Adjustments	-6,321	—	-0.81
Equity Value	**188,860**	—	**24.28**
Projected Diluted Shares	7,778		
Fair Value per Share (EUR)			**23.00**

The data in the table above represent base case forecasts in the company's reporting currency as of the beginning of the current year. Our fair value estimate may differ from the equity value per share shown due to our time value of money adjustment and in cases where probability weighted scenario analysis is performed.

© Morningstar 2021. All rights/licensed Unless otherwise provided in a separate agreement, you may use this report only in the country in which it is original distributed or issued. The information, data, analyses and opinions presented herein do not constitute investment advice; are provided solely for informational purposes and therefore are not an offer to buy or sell a security; are not warranted to be correct, complete or accurate. The opinions expressed are as of the date written and are subject to change without notice. Except as otherwise required by law, Morningstar shall not be responsible for any trading decisions, damages or other losses resulting from, or related to, the information, data, analyses or opinions or their use. The information contained herein is the proprietary property of Morningstar and may not be reproduced, in whole or in part, or used in any manner, without the prior written consent of Morningstar. Investment research is produced and issued by subsidiaries of Morningstar, Inc. including, but not limited to, Morningstar Research Services LLC, registered with and governed by the U.S. Securities and Exchange Commission. To view reports, call +1 312 696-6100. To licence the research, call +1 312 696-6869. Please see important disclosures at the end of this report.

Morningstar Equity Research

MORNINGSTAR

Shell PLC SHELL

All Your Documents in One Place

Search a wide breadth of company documents with precision.

DS <GO> is Bloomberg's research platform that lets you search across 200 million company documents using the latest AI and natural language processing to extract the most relevant insights.

Navigation Basics: Step by Step

Navigation Basics – NLP, AI, Suggested Topics, Tags and More

Search
Search for Keyword, ? for Help

Securities/Lists

Source
Recommended

Date
All Dates

Synonyms ▾ Filings ▾ Industries ▾ Annotations ▾ Page Count ▾ More Filters »

Search
Cloud

Keywords

Cloud	Smart Match
Cloud IN HEADLINES	Smart Match in Headlines
Cloud IN ANNOTATIONS	Smart Match in Annotations
"**Cloud**"	Exact Match

Topics

Cloud Computing	AI Suggested

Tags
Cloud_Computing

Research focus

CLOUD	**Cloud** Computing

Providers

Navigation Basics – Search on Tickers, List, Portfolio, Fund, Index

Search
Search for Keyword, ? for Help

Securities/Lists

Source
Recommended

Date
All Dates

Synonyms ▾ Filings ▾ Industries ▾ Annotations ▾ Page Count ▾ More Filters »

Securities

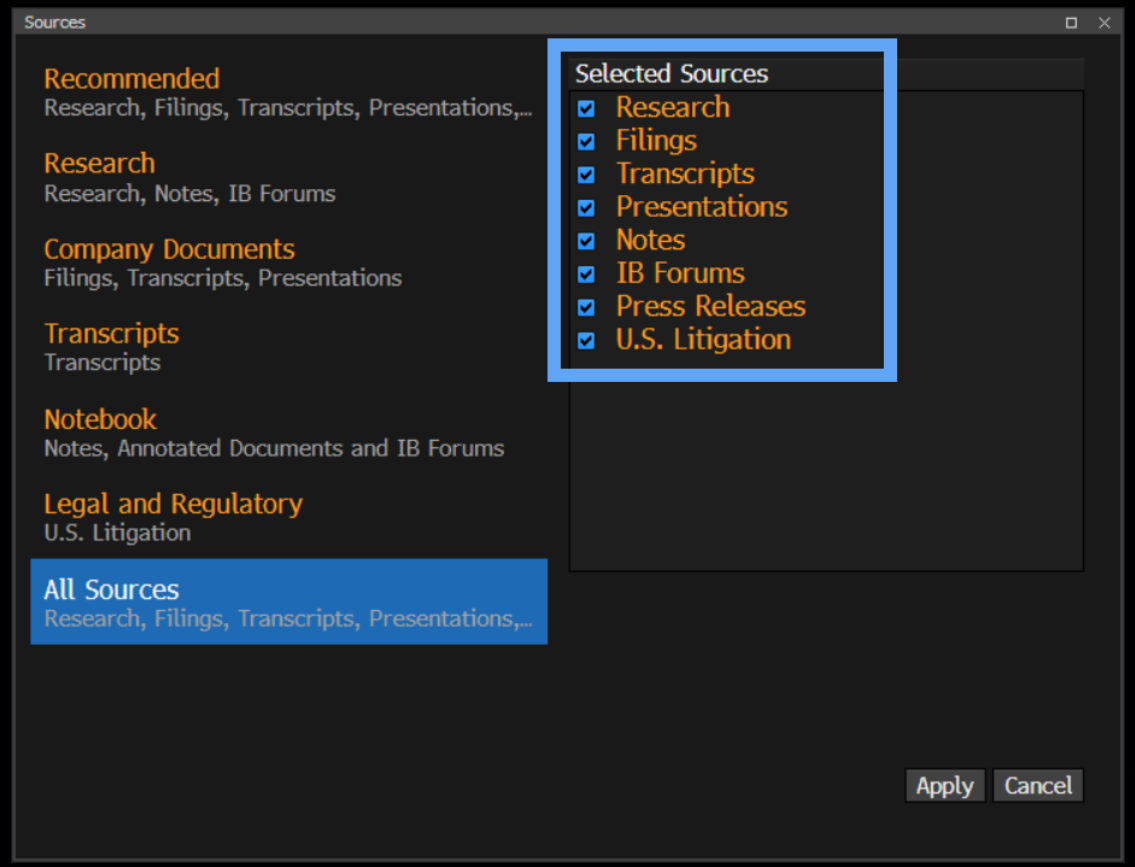
TXF CN Equity	CI **Tech** Giants **Cov**ered Call ETF (Canada)
COV CN Equity	**Cov**alon **Tech**nologies Ltd (Canada)
TXF CT Equity	CI **Tech** Giants **Cov**ered Call ETF (Toronto)
ZWT CN Equity	BMO **Cov**ered Call **Tech**nology ETF (Canada)
COVE CN Equity	**Cov**er **Tech**nologies Inc (Canada)
TXF/U CN Equity	CI **Tech** Giants **Cov**ered Call ETF (Canada)
MTLO CN Equity	Martello **Tech**nologies Group Inc (Canada) *CONS **Cov**e Resources Corp.*
TXF/B CN Equity	CI **Tech** Giants **Cov**ered Call ETF (Canada)
FTCCFX US Equity	First Trust 820 - **Tech**nology **Cov**ered Call Portfolio Series (U.S.)
COTL IN Equity	**Cov**idh **Tech**nologies Ltd (India)

My Security Lists

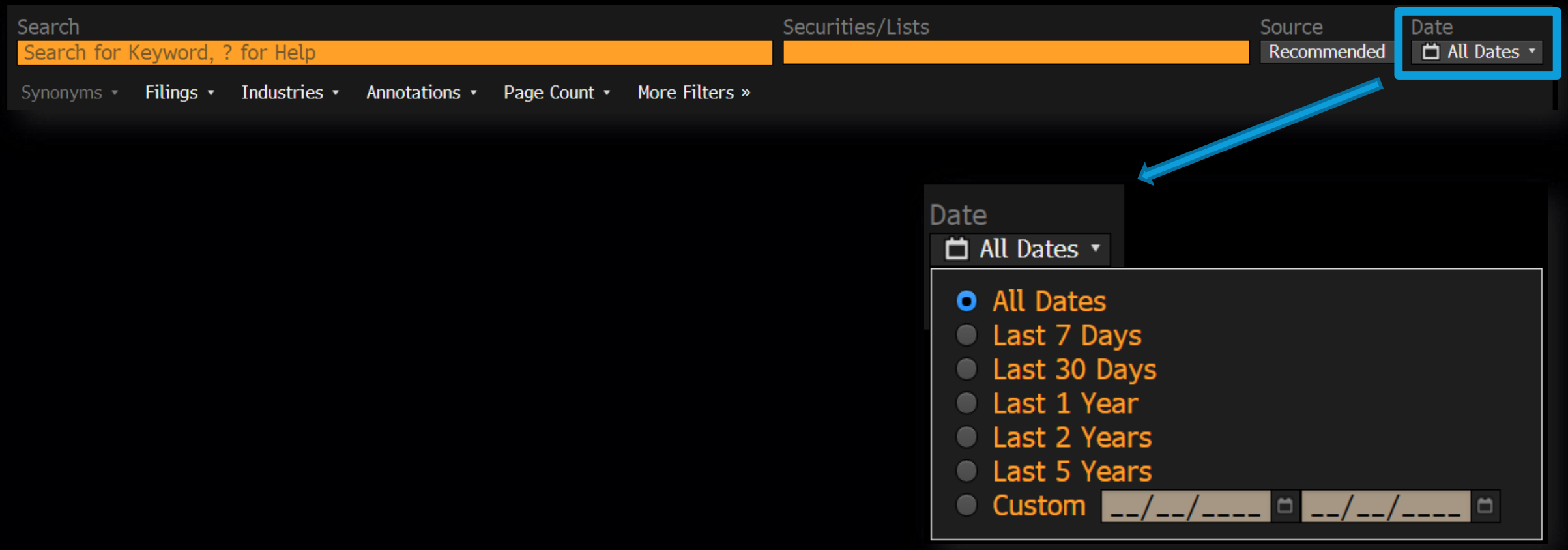
LB **Tech** **Cov**erage [772] (My Lists - W)

Browse Security Lists

Navigation Basics – Document Source Options



Navigation Basics – Date Range Selection



Navigation Basics – Additional Search Options

Search
cloud growth

Securities/Lists

Source
Recommended

Date
All Dates

19 Synonyms | Filings | Industries | Annotations | Page Count | More Filters »

19 Synonyms

Unselect All

- Amazon Aws
- Amazon Cloud
- Amazon Web Services
- Aws
- Azure
- Change
- Cloud Computing
- Cloud Native
- Cloud Transition
- Cloud-based
- Google Cloud
- Growth Rate
- Gwth
- Percent Change
- Percent Growth

All Synonyms

Filings

Find Filings

All Filings »

Advanced Form Search

Search

forms

- 13F
- CMO
- Equity
- Fixed Income
- Import/Export
- Invoices
- Loan Agreement
- Money Market
- Muni

Industries

Find Industries

- Communications
- Consumer Discretionary
- Consumer Staples
- Energy
- Financials
- Real Estate
- Health Care
- Industrials
- Materials

All Industries »

Annotations

- My Annotations
- Annotations Shared with Me

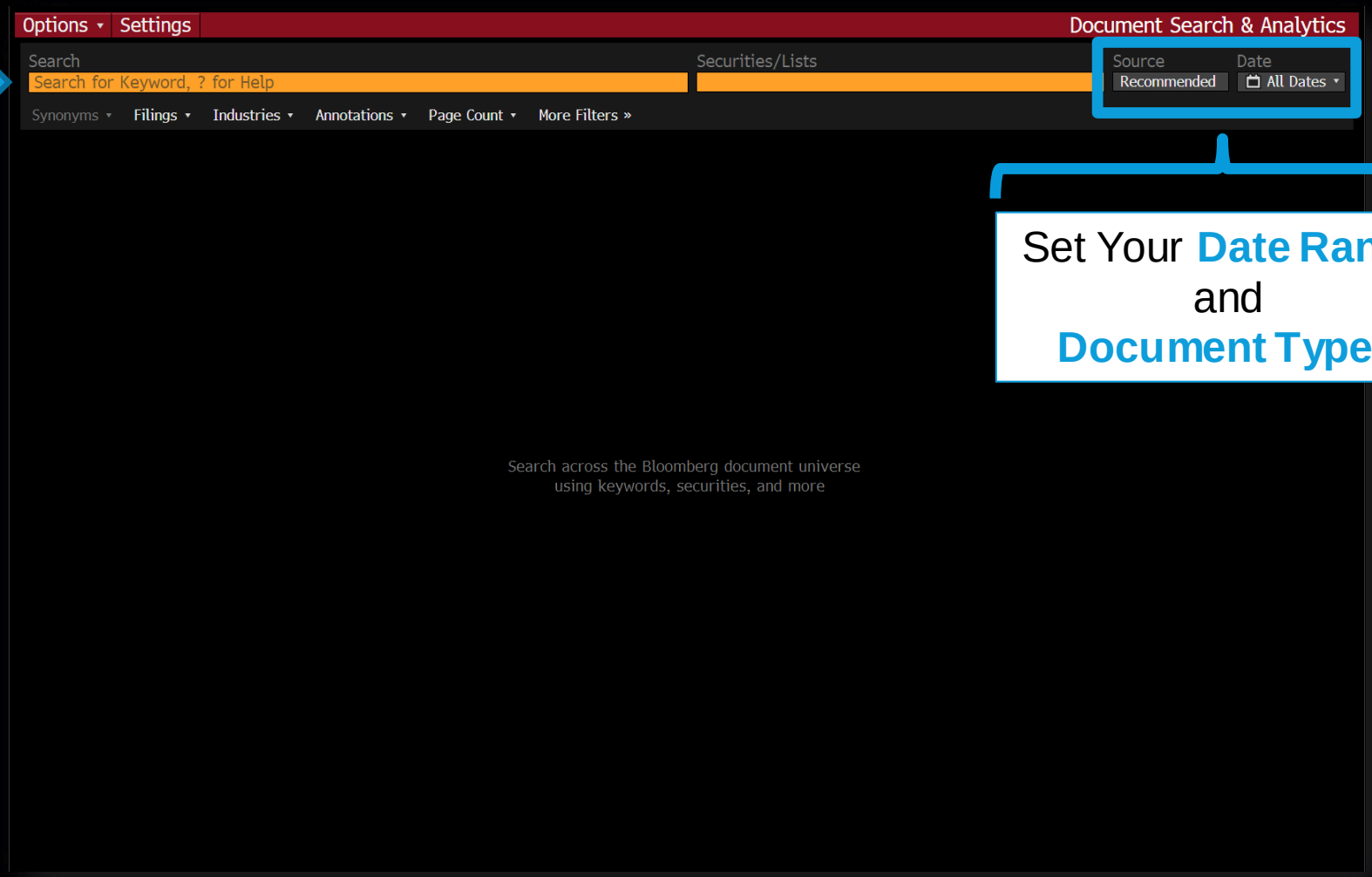
Page Count

Show results at least _____ pages

Getting Started:
How to Build a Search

Load DS <GO>, Enter Search Term

Enter **Search Term**



Set Your **Date Range** and **Document Types**

Example: ESG Linked Compensation

Options ▾ Settings Export ▾

Document Search & Analytics

Search

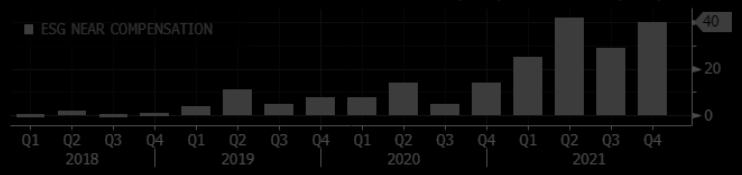
esg compensation

27 Synonyms ▾ Industries ▾ Annotations ▾

Securities/Lists | Source: Transcripts | Date: Custom

Climate Change | Knorr-Bremse AG

01/01/2018 - 31/12/2021



Show Details

Documents		Type	Time
Wacker Chemie AG: Capital Markets Day		Shareholder Mtg C…	12/16/21
Scott McCollist…	Is achieving **sustainability** targets part of management **compensation**?		
AltaGas Ltd: Investor Day		Shareholder Mtg C…	12/15/21
Shaheen Amirali	Linking critical **ESG** components to **compensation** through our value drivers is not new for us. As an essential energy provider, safety performance has always been tied to **compensation**.		
Laurentian Bank of Canada: Investor Day		Shareholder Mtg C…	12/10/21
Rania Llewellyn	And in making the better choice, we've tied **ESG** metrics to executive **compensation**. Our success and momentum over the past year demonstrates that we are capable of great accomplishments and that we are on the right track.		
Rania Llewellyn	We tied **ESG** and financial metrics to **compensation**. Our leaders will be held accountable to living our cultural values which will be linked to their compensation. So it's not just the What but also the How.		
Tyson Foods Inc: Investor Day		Shareholder Mtg C…	12/09/21
John	In fact, all officer compensation enterprise-wide had their **compensation** tied to **ESG** metrics this year.		

Example: ESG Linked Compensation

Options ▾ | Settings | Export ▾ — Document Search & Analytics

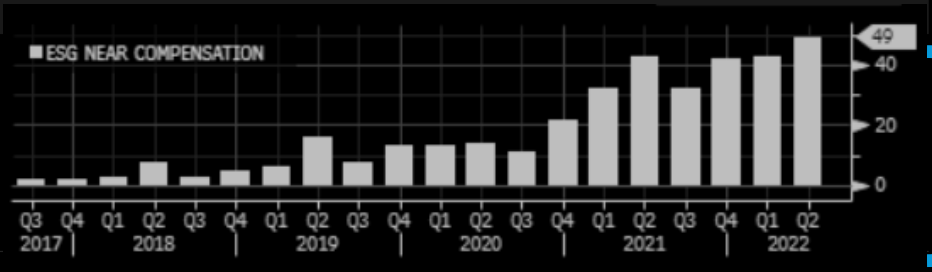
Search: esg compensation

Securities/Lists | Source: Transcripts | Date: Custom ▾

27 Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

Trends | More Trends »

Topic | More »	Transcript Remarks | »	Securities | More »
Corporate Governance	Prepared Remarks	Algonquin Power & Util...
Environment (ESG)	Mgmt Answers	Acuity Brands Inc
Executive Compensation	Analyst Questions	Ameren Corp
Climate Change		Knorr-Bremse AG



Mentions Analytics

☑ Show Details

Documents	Type	Time
Sekisui Chemical Co Ltd: Presentation of Strategic Area MAP & Life Science Business	M&A Call	06/29/22
Futoshi Kamiwaki: And this format is not just specific to the Directors, but similar pay structure also applies to Executive Officers and Managers with some difference in the ratio of different types of **compensation**. So basically **ESG** related KPIs are also linked to their performance pay.		
Tupy SA: Investor Day	Shareholder Mtg C...	06/28/22
Fernando Cestari de Rizzo: An important topic we are -- we have recognition from WOB of the nine members, three are women and in the Governance Committee, we defined that ESG should be included in the valuation process. All the managers have **ESG** indicators for their **compensation**.		
Suzano SA: ESG Day	Shareholder Mtg C...	06/23/22
Marcelo Bacci: Basically, when doing a sustainability-linked loan or bond, you're linking the results of a set of results related to **sustainability** to the **compensation** or remuneration that the bondholder or the loaner will have in the future.		

Excerpts Visualized

Zoom on Analytics : ESG Linked Compensation Growing

Options ▾ Settings Export ▾

Search

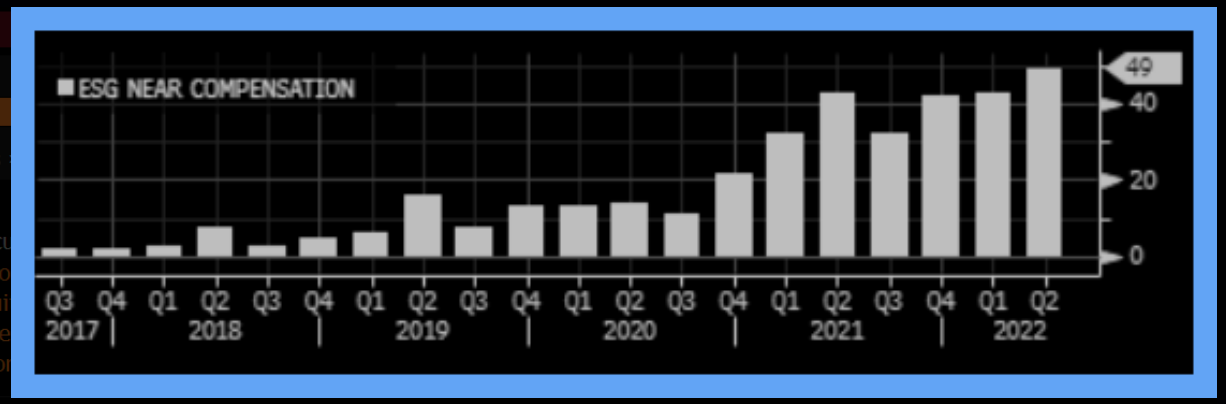
esg compensation

27 Synonyms ▾ Industries ▾ Annotations ▾ More Filters

Trends | More Trends »

Topic | More »
Corporate Governance
Environment (ESG)
Executive Compensation
Climate Change

Transcript Remarks | »
Prepared Remarks
Mgmt Answers
Analyst Questions



Show Details

Documents	Type	Time
Wacker Chemie AG: Capital Markets Day	Shareholder Mtg C…	12/16/21
Scott McCollist… — Is achieving **sustainability** targets part of management **compensation**?		
AltaGas Ltd: Investor Day	Shareholder Mtg C…	12/15/21
Shaheen Amirali — Linking critical **ESG** components to **compensation** through our value drivers is not new for us. As an essential energy provider, safety performance has always been tied to **compensation**.		
Laurentian Bank of Canada: Investor Day	Shareholder Mtg C…	12/10/21
Rania Llewellyn — And in making the better choice, we've tied **ESG** metrics to executive **compensation**. Our success and momentum over the past year demonstrates that we are capable of great accomplishments and that we are on the right track.		
Rania Llewellyn — We tied **ESG** and financial metrics to **compensation**. Our leaders will be held accountable to living our cultural values which will be linked to their compensation. So it's not just the What but also the How.		
Tyson Foods Inc: Investor Day	Shareholder Mtg C…	12/09/21
John — In fact, all officer compensation enterprise-wide had their **compensation** tied to **ESG** metrics this year.		

Zoom on Excerpts: ESG Tied To Compensation

Options | Settings | Export | Document Search & Analytics

Search: esg compensation | Securities/Lists | Source: Transcripts | Date: Custom

27 Synonyms | Industries | Annotations | More Filters »

Trends | More Trends »

Topic | More »: Corporate Governance, Environment (ESG)

Transcript Remarks | »: Prepared Remarks, Mgmt Answers

Securities | More »: Algonquin Power & Util..., Acuity Brands Inc

01/01/2018 - 31/12/2021

Sekisui Chemical Co Ltd: Presentation of Strategic Area MAP & Life Science Business — M&A Call — 06/29/22

Futoshi Kamiwaki: And this format is not just specific to the Directors, but similar pay structure also applies to Executive Officers and Managers with some difference in the ratio of different types of **compensation**. So basically **ESG** related KPIs are also linked to their performance pay.

Tupy SA: Investor Day — Shareholder Mtg C... — 06/28/22

Fernando Cestari de Rizzo: An important topic we are -- we have recognition from WOB of the nine members, three are women and in the Governance Committee, we defined that ESG should be included in the valuation process. All the managers have **ESG** indicators for their **compensation**.

Suzano SA: ESG Day — Shareholder Mtg C... — 06/23/22

Marcelo Bacci: Basically, when doing a sustainability-linked loan or bond, you're linking the results of a set of results related to **sustainability** to the **compensation** or remuneration that the bondholder or the loaner will have in the future.

Click through to Source Document

Options | Settings | Export | Document Search & Analytics

Search: esg compensation | Securities/Lists | Source: Transcripts | Date: Custom

27 Synonyms | Industries | Annotations | More Filters »

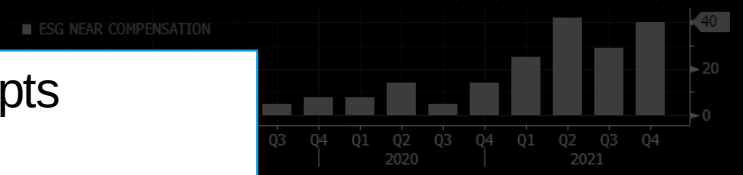
Trends | More Trends »

Topic | More »
- Corporate Governance
- Environment (ESG)
- Executive Compensation
- Climate Change

Transcript Remarks | »
- Prepared Remarks
- Mgmt Answers
- Analyst Questions

Securities | More »

01/01/2018 - 31/12/2021



Click into Excerpts
to go to
Source Document

Show Details

Documents	Type	Time
Sekisui Chemical Co Ltd: Presentation of Strategic Area MAP & Life Science Business	M&A Call	06/29/22

Futoshi Kamiwaki: And this format is not just specific to the Directors, but similar pay structure also applies to Executive Officers and Managers with some difference in the ratio of different types of **compensation**. So basically **ESG** related KPIs are also linked to their performance pay.

Tupy SA: Investor Day	Shareholder Mtg C...	06/28/22

Fernando Cestari de Rizzo: An important topic we are -- we have recognition from WOB of the nine members, three are women and in the Governance Committee, we defined that ESG should be included in the valuation process. All the managers have **ESG** indicators for their **compensation**.

Suzano SA: ESG Day	Shareholder Mtg C...	06/23/22

Marcelo Bacci: Basically, when doing a sustainability-linked loan or bond, you're linking the results of a set of results related to **sustainability** to the **compensation** or remuneration that the bondholder or the loaner will have in the future.

Zoom To Source

Wendel SE: Investor Day — Shareholder Mtg Call 12/02/21

Christine Anglade Pirzadeh	So, where do we stand today in our first years of deploying our **ESG** roadmap? Ratings and managing **compensation** are two major topics, I will dwell on today.
Christine Anglade Pirzadeh	All of our portfolio companies CEO's have **variable compensation** objectives, linked to **ESG**, specifically linked to climate change efforts. To give us just a very concrete example, Stahl has reduced its carbon emission by 25% between 2015 and 2019.
Christine Anglade Pirzadeh	19% of all the **compensation** is tied to **ESG** objectives. For example, in 2020, one of these objectives was to conduct a climate risk analysis in a controlled company, based on the TCFD frameworks. And let me you're your (Technical Difficulty) criteria, related to climate risk.

DOCV Document Viewer

History | LAURENTIAN BANK: Shareholder ... | Wendel SE: Shareholder Mtg Call

((ESG*) OR (SDG) OR (SDGS) OR ("CHANGI 1/3

2 Attachments | Share Annotations

Sidebar | Comment | Highlight | Actions | Automatic Zo...

Search | Annotations | Intelligence

Tags

Add a tag to this document

Annotations (1)

Your Annotations (1)

Private | Share Annotations

Transcript (1)

PHILIP CAPONE

What are the concrete actions we have to achieve this recognition? ESG consideration are fully embedded at every level in Wendel Financial Policy. All of our portfolio companies CEO's have variable compensation objectives, linked to ESG, specifically linked to clima...

More Text

Bloomberg Transcript

FINAL

Wendel has been investing significantly in ESG at both the holding company level and in our portfolio. We have established 2023 ESG roadmap with objectives and KPIs, that we are tracking closely and disclosing on an annual basis.

We are addressing several ESG priorities with a special focus on climate, health and safety, diversity and eco innovations. So, where do we stand today in our first years of deploying our ESG roadmap? Ratings and managing compensation are two major topics, I will dwell on today.

On Slide 24 first, our efforts are being acknowledged in the most prominent indexes and by rating agencies. All of our ratings have improved this year. I will look at it. For the second year, Wendel has been included in the Dow Jones Sustainability World and Europe Indices. And our MSCI and Sustainalytics grades have improved too. This strong result demonstrate that our ESG strategy pays off, and more to say that our collectivity [ph] forms are recognized, especially when it comes to responsible investments, governance, diversity and climate change.

We also have improved our ESG communication with our stakeholders. Just let me give you a few examples. We have created the new ESG sections on the website and that engages with shareholders and others in dedicated ESG focus and (Inaudible). Transparency is a key value for both the stakeholders and us. What proves our commitment to that is, that Wendel has been ranked most transparent company in the EDF [ph] 125 Stock Market Index.

What are the concrete actions we have to achieve this recognition? ESG consideration are fully embedded at every level in Wendel Financial Policy. All of our portfolio companies CEO's have variable compensation objectives, linked to ESG, specifically linked to climate change efforts. To give us just a very concrete example, Stahl has reduced its carbon emission by 25% between 2015 and 2019. And Constantia has also reduced its emissions by 70% over that period.

And on compensation of our executive board, what can we add them? What do add? 19% of all the compensation is tied to ESG objectives. For example, in 2020, one of these objectives was to conduct a climate risk analysis in a controlled company, based on the TCFD frameworks. And let me you're your (Technical Difficulty) criteria, related to climate risk.

We have also embedded ESG objectives in the financial conditions of the new syndicated loan we put in place earlier this year. To sum up, Wendel is strongly committed to promoting ESG intangible and comprehensive ways. While ESG is a very long journey and 2021 is only the first years of deploying a roadmap, we are proud of our progress and we are determined to continue to improve our results.

Thank you. I will now leave the floor to Andre.

What are the concrete actions we have to achieve this recognition? ESG consideration are fully embedded at every level in Wendel Financial Policy. All of our portfolio companies CEO's have variable compensation objectives, linked to ESG, specifically linked to climate change efforts. To give us just a very concrete example, Stahl has reduced its carbon emission by 25% between 2015 and 2019. And Constantia has also reduced its emissions by 70% over that period.

And on compensation of our executive board, what can we add them? What do add? 19% of all the compensation is tied to ESG objectives. For example, in 2020, one of these objectives was to conduct a climate risk analysis in a controlled company, based on the TCFD frameworks. And let me you're your (Technical Difficulty) criteria, related to climate risk.

Journalise Your Research

What are the concrete actions we have to achieve this recognition? ESG consideration are fully embedded at every level in Wendel Financial Policy. All of our portfolio companies CEO's have variable compensation objectives, linked to ESG, specifically linked to climate change efforts. To give us just a very concrete example, Stahl has reduced its carbon emission by 25% between 2015 and 2019. And Constantia has also reduced its emissions by 70% over that period.

And on compensation of our executive board, what can we add them? What do add? 19% of all the compensation is tied to ESG objectives. For example, in 2020, one of these objectives was to conduct a climate risk analysis in a controlled company, based on the TCFD frameworks. And let me you're your (Technical Difficulty) criteria, related to climate risk.

We have also embedded ESG objectives in the financial
syndicated loan we put in place earlier this year. To sum
committed to promoting ESG intangible and comprehen
long journey and 2021 is only the first years of deploying
our progress and we are determined to continue to impr

Thank you. I will now leave the floor to Andre.

Andre Francois-Poncet {BIO 3521514 <GO>}

PHILIP CAPONE
01/02/22, 12:26
Comp is variable

PHILIP CAPONE
01/02/22, 12:27
19% Comp Tied to ESG Objectives

Comment

DOCV Document Viewer

History | LAURENTIAN BANK: Shareholder ... | Wendel SE: Shareholder Mtg Call

((ESG*) OR (SDG) OR (SDGS) OR ("CHANGI 3/3

2 Attachments | Share Annotations

Sidebar | Comment | Highlight | Actions | Automatic Zo...

Search | Annotations | Intelligence

Tags

Add a tag to this document

Annotations (1)

Your Annotations (1)

Private | Share Annotations

Transcript (1)

PHILIP CAPONE

What are the concrete actions we have to achieve this recognition? ESG consideration are fully embedded at every level in Wendel Financial Policy. All of our portfolio companies CEO's have variable compensation objectives, linked to ESG, specifically linked to clima...

More Text

PHILIP CAPONE 01/02/22, 12:26
Comp is variable

PHILIP CAPONE 01/02/22, 12:27
19% Comp Tied to ESG Objectives

Bloomberg Transcript

FINAL

We are addressing several ESG priorities with a special focus on climate, health and safety, diversity and eco innovations. So, where do we stand today in our first years of deploying our ESG roadmap? Ratings and managing compensation are two major topics, I will dwell on today.

On Slide 24 first, our efforts are being acknowledged in the most prominent indexes and by rating agencies. All of our ratings have improved this year. I will look at it. For the second year, Wendel has been included in the Dow Jones Sustainability World and Europe Indices. And our MSCI and Sustainalytics grades have improved too. This strong result demonstrate that our ESG strategy pays off, and more to say that our collectivity [ph] forms are recognized, especially when it comes to responsible investments, governance, diversity and climate change.

We also have improved our ESG communication with our stakeholders. Just let me give you a few examples. We have created the new ESG sections on the website and that engages with shareholders and others in dedicated ESG focus and (Inaudible). Transparency is a key value for both the stakeholders and us. What proves our commitment to that is, that Wendel has been ranked most transparent company in the EDF [ph] 125 Stock Market Index.

What are the concrete actions we have to achieve this recognition? ESG consideration are fully embedded at every level in Wendel Financial Policy. All of our portfolio companies CEO's have variable compensation objectives, linked to ESG, specifically linked to climate change efforts. To give us just a very concrete example, Stahl has reduced its carbon emission by 25% between 2015 and 2019. And Constantia has also reduced its emissions by 70% over that period.

And on compensation of our executive board, what can we add them? What do add? 19% of all the compensation is tied to ESG objectives. For example, in 2020, one of these objectives was to conduct a climate risk analysis in a controlled company, based on the TCFD frameworks. And let me you're your (Technical Difficulty) criteria, related to climate risk.

We have also embedded ESG objectives in the financia
syndicated loan we put in place earlier this year. To sum
committed to promoting ESG intangible and comprehe
long journey and 2021 is only the first years of deployin

Thank you. I will now leave the floor to Andre.

Andre Francois-Poncet {BIO 3521514 <GO>}

PHILIP CAPONE
01/02/22, 12:26
Comp is variable

PHILIP CAPONE
01/02/22, 12:27
19% Comp Tied to ESG Objectives

Comment

Access Your Research Back in Document Search Platform

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists | Source: Transcripts | Date: Custom ▾

Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters » | Clear Filters

- [x] My Annotations
- [ ] Annotations Shared with Me

Trends | More Trends »

01/01/2018 - 31/12/2021

Topic | More »			Transcript Types | »	Sector | More »
Revenue			Earnings Call	Consumer Discretionary
Guidance	Mgmt Answers	JPMorgan Chase & Co	Conf/Presentation Call	Energy
Pricing	Analyst Questions	Exxon Mobil Corp	M&A Call	Financials
Consumer Demand		LVMH Moet Hennessy L...	Shareholder Mtg Call	Industrials

Show Details

Documents	Securities	Type	Time
Wendel SE: Investor Day	MF FP Equity	Shareholder Mtg Call	12/02/21
Solvay SA: ESG Webinar	SOLB BB Equity	Conf Presentation Call	12/01/21
UiPath Inc: Q2 2022 Earnings Call	PATH US Equity	Earnings Call	09/07/21
Tecan Group AG: S1 2021 Earnings Call	TECN SW Equity	Earnings Call	08/18/21
Kansas City Southern/Old: Q2 2021 Earnings Call	KSU US Equity	Earnings Call	07/16/21
Iron Mountain Inc: Nareit REITweek 2021 Virtual Investor Conference	IRM US Equity	Conf Presentation Call	06/09/21
Caterpillar Inc: Q1 2021 Earnings Call	CAT US Equity	Earnings Call	04/29/21
Apple Inc: Q2 2021 Earnings Call	AAPL US Equity	Earnings Call	04/28/21
Netflix Inc: Q1 2021 Earnings Call	NFLX US Equity	Earnings Call	04/21/21

Document Search Notebook | DS NOTE <GO>

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help

Securities/Lists: TSLA US Equity ×

Source: Notebook

Date: All Dates ▾

Industries ▾ | Annotations ▾ | Tags ▾ | Pages ▾ | More Filters » | Alert | Clear

Mentions

Last 24 Months

Document Types | »	Authors | More »	Securities | More »
Notes	Louis Bellamacina	Apple Inc
Transcripts	Jamie Douglas Coutts	Hewlett Packard Enterp...
Research	Moritz Hamann	Dell Technologies Inc
Filings	Stephen Aves	

Show Details

Documents	Type	Owners	Page	Date
(TSLA US Equity) Equity Research: Meeting Note	Note	Moritz Hamann	4	09/08/22
Consumer Discretionary	IB Forum			09/07/22
Morning Call	IB Forum			08/25/22
(TSLA US Equity) Equity Research: Investment Update	Note	Nick Joseph	4	08/01/22
Tesla	Acquisdata Pty Ltd		11	08/01/22
Tesla Earnings Note	Note	Nick Joseph		07/21/22
Technology, Equity Research	IB Forum			07/21/22
Tesla Inc: Q2 2022 Earnings Call	Earnings Call			07/20/22
Tesla reporting today	Note	Louis Bellamacina		07/20/22
Morning Call	IB Forum			07/20/22
Technology	IB Forum			07/12/22
Equity Research	IB Forum			07/11/22
Equity Research	IB Forum			07/06/22
BYD May Sell Batteries to Tesla, Executive Tells State Media	Note	Stephen Aves		06/08/22
IT Hardware and US Electric Vehicles: Key Takeaways from our 6+ CEO Conversat	Bernstein		17	06/08/22
Moe's research note	Note	Moritz Hamann		05/13/22
RRES ID link	[illegible]	Moritz Hamann	2	04/21/22

rg Buy-Side Solutions

Organising and managing unstructured data is not limited to public and proprietary documents | Welcome to IB Forums

DS Document Search | DS Document Search | MSG Schedule to go out Tuesday

MENU OUT Team Other Time MMM ARAP Jira RESM DRQS FTAM BLP Hub QATB CMPN ZOOM QADM

APPLE INC Equity | DS | Related Functions Menu | Message

<Back> to Return

Options | Settings | Export | Document Search & Analytics

Search: game-changing | Securities/Lists: AAPL US Equity | Source: Research | Date: All Dates

0 Synonyms | Primary | Industries | Providers | Research Actions | Ratings | Annotations | Pages | Asset Class | More Filters » | Alert | Clear

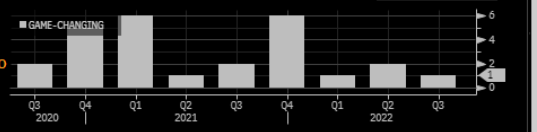
Mentions — Last 24 Months

Topic | More »
- New Products
- Competition
- Pricing
- Margins

Providers | More »
- HSBC
- Bernstein
- Wedbush
- Arete

Securities | More »
- HP Inc
- Hewlett Packard Enterprise Co
- Dell Technologies Inc

Trends — More Trends »



Show Details

1 Telecomms & Media LOUIS BELLAMACINA 05/09/2022 — {**AAPL US Equity**} these aren't **game-changing** overhauls, but I still think they will be enough to entice users of iPhone 11 models and earlier to upgrade–especially given my expectation of another year of strong trade-in deals from Apple and its partners.

Fitness Industry – Consumer Behaviour Shifts & Digital Fitness Demand Outlook	ThirdBridge	04/29/22
Page 1 — Q: Do you have any perspective on labour challenges faced by gym operators across tiers? ... 12 ... Q: Are any vendors out there behind technologies that could be **game-changing** for operators trying to address the ... labour hiccups? ... 12 ... Private and confidential ...		
Page 1 — who they've trained up but address the shortage by using technology to help with that. ... [00:42:36] ... Q: Are any vendors out there behind technologies that could be **game-changing** for operators trying to ... address the labour hiccups? ... MI: Yes.		
Quick Take: iPhones may soon accept payments - does it matter (for Square and merchant acquirers)?	Bernstein	01/27/22
Page 1 — 2022) ... PayPal: Under siege - can it defend its turf? Downgrading to Market-Perform (November 2021) ... Square-Afterpay: A **game-changing** deal (August 2021) ... PayPal-Pinterest: Why PinPay is a match NOT made in heaven (October 2021) ...		
AAPL: Apple, AR and the Metaverse... What? How big? Game changing?	Bernstein	12/06/21

Suggested Functions | **EVTS** Search & analyze corporate events | **NLRT** Manage your news searches & alerts

IB - IB Manager | Options

IB Manager

Start/Find Chats
- Sales Stakeholders
- Client Partnerships EMEA
- Client Partnerships AMER
- PI
- Scrum
- Research Support
- PM of the Future
- Teams
- Forums
  - Industrials
  - Morning Call
  - Energy
  - Technology
  - Financials
  - Telecomms & Medi...
  - European Forum Be...
  - Materials
  - Consumer Staples ...
  - Utilities
  - Consumer Discretio...
  - Government
  - comms
  - Fixed Income
  - New Issues
  - Pharma
  - ESG
  - Real Estate

Telecomms & Media — 12/31

17:32:23 DS Iveco Group - 2Q22 Beat and Sound Execution Reinforces Credibility

17:32:28 DS Intermonte report on STM "Market Needs to See it to Believe it" 220729

17:32:33 DS Italian Wake Up Call - 02 August 2022

17:32:59 DS Daily Credit Briefing

Reply to: 17:32:59 LOUIS BELLAMACINA: DS Daily Credit Briefing

17:33:53 Liz have you seen the news on RACE IM Equity € B17 AC ↑190.65 -6.0(-3.05%) it looks like they are impacted by new chip shortages. Should we contact our sellside analyst for more details?

ELIZABETH ATTAH

Reply to: 17:33:53 LOUIS BELLAMACINA: Liz have you seen the news on RACE IM Equity € B17 AC ↑190.65 -6.0(-3.05%) it looks like they are impacted by new chip shortages. Should we ...

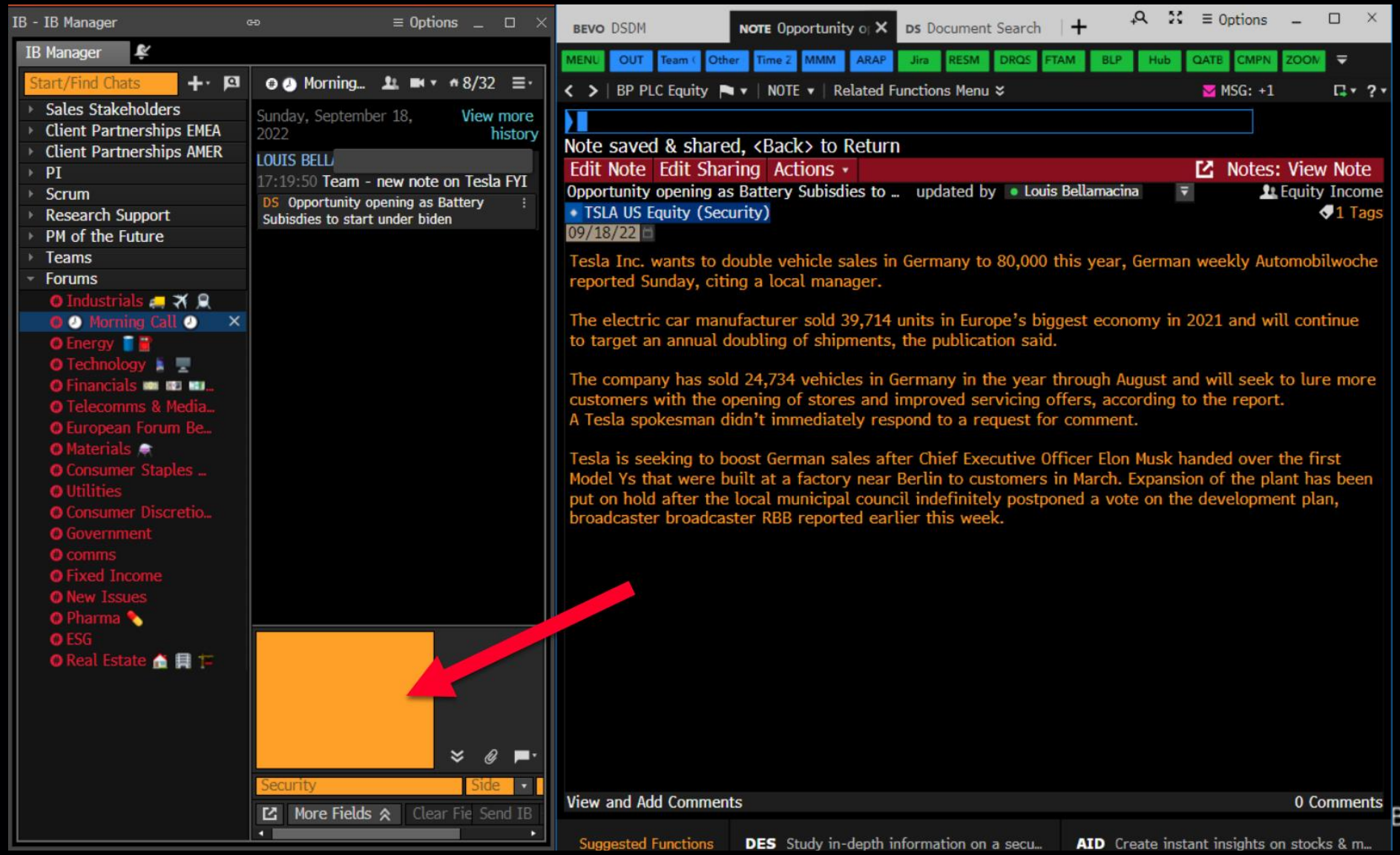
17:34:27 Lets do it

LOUIS BELLAMACINA

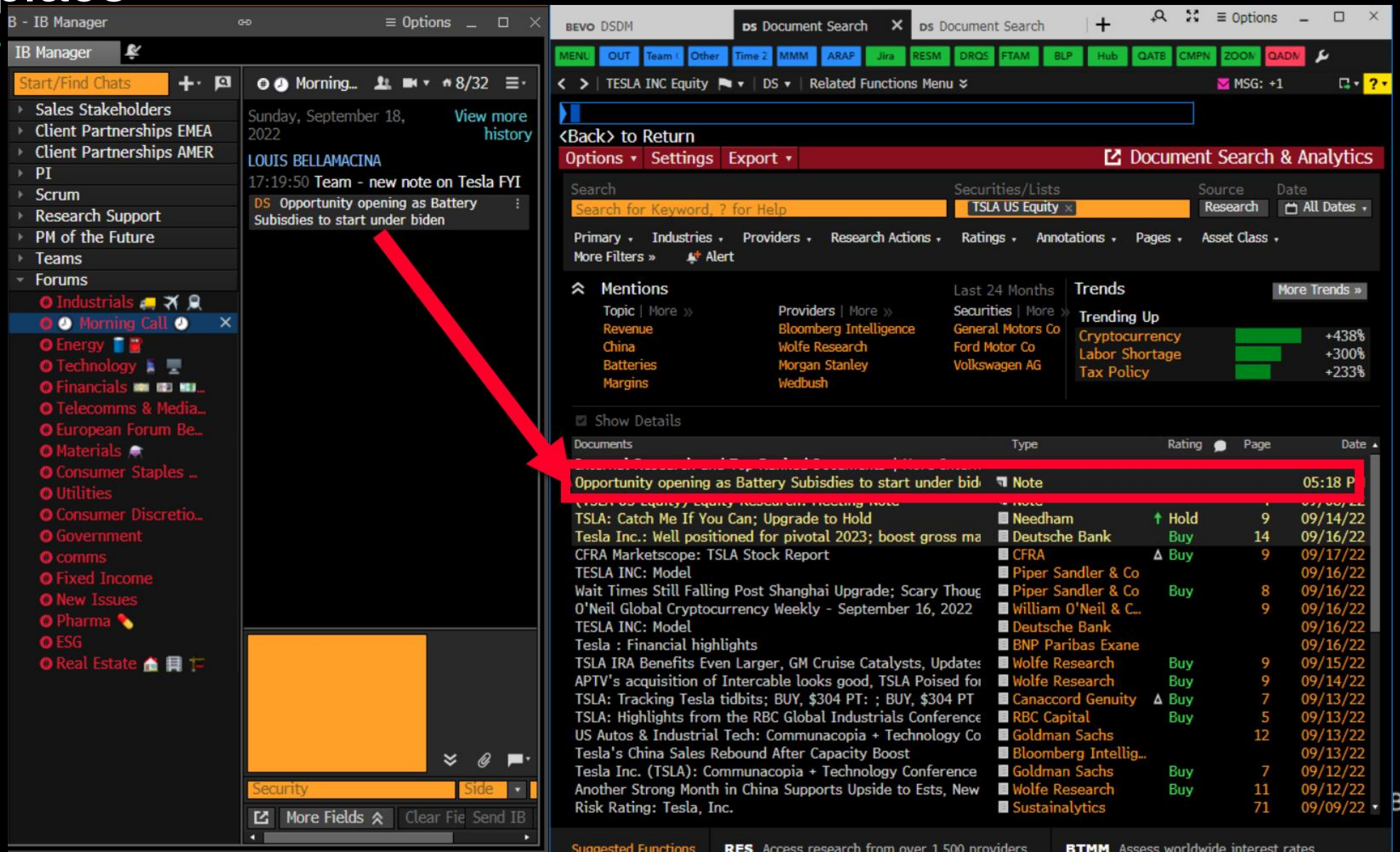
18:29:50 The regular iPhone 14 models will get some camera hardware changes, but the most significant upgrades will be reserved for the Pro line–and that could be a theme of the event. The company's upscale products should generate the most fireworks at Wednesday's launch, which will include a new high-end Apple Watch and upgraded AirPods Pro earbuds.

2 18:30:55 AAPL US Equity $ B17 ↓155.81 -2.15(-1.36%) these aren't game-changing overhauls, but I still think they will be enough to entice users of iPhone 11 models and earlier to upgrade–especially given my expectation of another year of strong trade-in deals from Apple and its partners.

Note sharing is easy, bring all your unstructured data to one place



Note sharing is easy, bring all your unstructured data to one place



Building a Search with operators

Set Your **Date Range** and **Document Types**

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search
"aws" or "azure" or "google cloud"

Securities/Lists

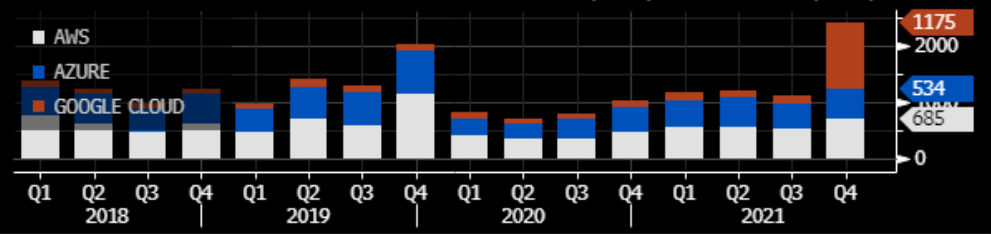
Source: Transcripts | Date: Custom ▾

Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

Trends | More Trends »

01/01/2018 - 31/12/2021

Topic | More »	Transcript Remarks | »	Securities | More »
Cloud Computing	Prepared Remarks	VMware Inc
Partnerships	Mgmt Answers	Microsoft Corp
Revenue	Analyst Questions	Zendesk Inc
Competition		NetApp Inc



Search For Leading Cloud Providers By Common Name:

AWS, Azure and Google Cloud

Cross-Company Analytics

View Detailed Analytics

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search: "aws" or "azure" or "google cloud"

Securities/Lists

Source: Transcripts

Date: Custom ▾

Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

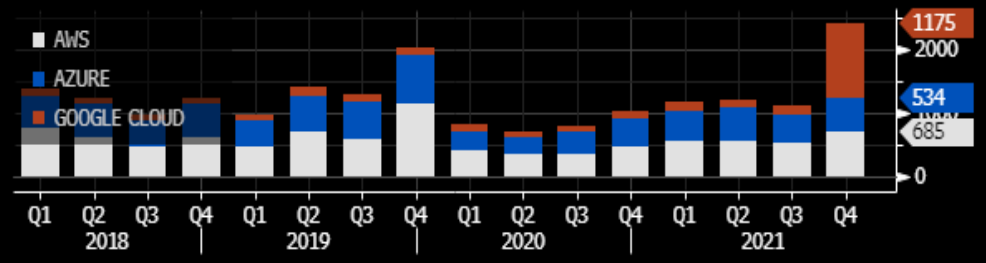
Trends | More Trends »

Topic | More »
- Cloud Computing
- Partnerships
- Revenue
- Competition

Transcript Remarks | »
- Prepared Remarks
- Mgmt Answers
- Analyst Questions

Securities | More »
- VMware Inc
- Microsoft Corp
- Zendesk Inc
- NetApp Inc

01/01/2018 - 31/12/2021



Click **'Trends'** For Detailed Analytics & Insights

Cloud Computing Market Share Trends

Document Search & Analytics

Search: "aws" or "azure" or "google cloud"

Securities/Lists

Source: Transcripts

Date: Custom

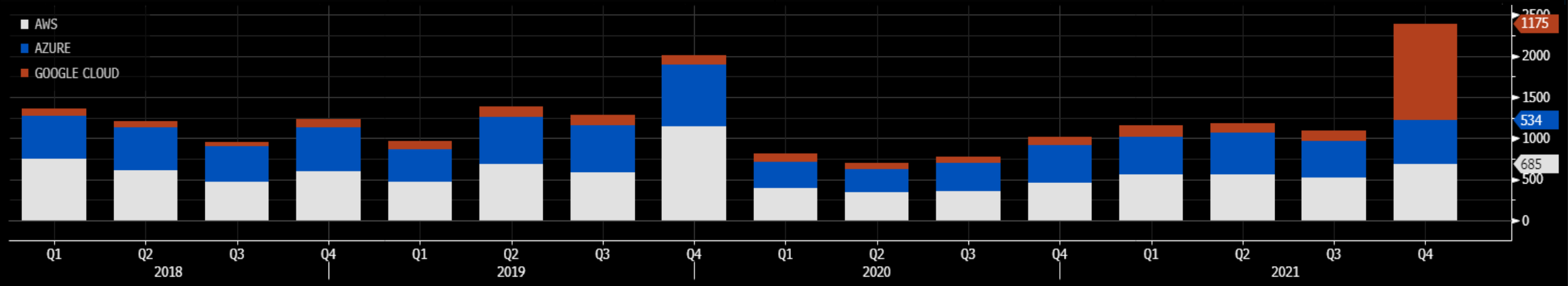
Synonyms · Industries · Annotations · More Filters »

Trends

Search > Trends

Quarterly

Largest Mentions		New Mentions		Largest Change Up		Largest Change Down	
Cloud Computing	Q4 2021	Greenhouse Gas Emissions	Q4 2021	Orders	+600%	Selling, General, &...	-100%
Cloud Computing	Q3 2021	Monthly Active Users (MA...	Q4 2021	Inventory	+600%	Water Management	-100%
Cloud Computing	Q2 2021	Genomics	Q4 2021	Climate Change	+550%	Ethics & Compliance	-100%



Bloomberg Buy-Side Solutions

Second Level: Screen for Company Exposures

Options ▾ | Settings | Export ▾ — Document Search & Analytics

Search: aws or azure or google cloud

Securities/Lists

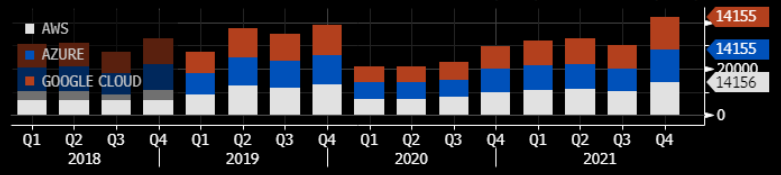
Source: Transcripts | Date: Custom ▾

13 Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

Trends | More Trends »

01/01/2018 - 31/12/2021

Topic | More »	Transcript Remarks | »	Securities | More »
Cloud Computing	Prepared Remarks	salesforce.com Inc
Revenue	Mgmt Answers	Arista Networks Inc
Guidance	Analyst Questions	NVIDIA Corp
Partnerships		



☑ Show Details

Toggle Off
Excerpt View

Documents	Type	Time
FuelCell Energy Inc: Q4 2021 Earnings Call	Earnings Call	12/29/21

Jason Few — After the removal of the litigation **cloud** caused by POSCO Energy's counterclaims, while we believe that we had previously been able to serve this market following our termination of various agreements with POSCO Energy, the litigation with POSCO created market confusion for customers, which made it difficult

Eric Stine — Maybe just last one from me, just on the product sales, I mean obviously you talked about Asia and how this POSCO agreement now removes that **cloud** and hopefully starts to open up that market in terms of product sales.

Skillsoft Corp: Acquisition of Codecademy by Skillsoft	M&A Call	12/22/21

Jeff Tarr — complimentary platform will significantly expand Skillsoft's capabilities in the high-growth Tech & Dev segment, enabling us to provide our learners an innovative and effective way to learn 14 programming languages across numerous domains, including web development, game development, mobile, data science, **cloud**

Paychex Inc: Q2 2022 Earnings Call	Earnings Call	12/22/21

Martin Mucci — Use of our **cloud-based** applications continues to grow with double-digit increases in both desktop and mobile devices. During our recent open enrollment period for our PEO clients, for example, 99% of our PEO worksite employees completed their open enrollment digitally, resulting in a 26% reduction in

Second Level: Screen for Company Exposure

Options | Settings | Export | Document Search & Analytics

Search: aws or azure or google cloud | Securities/Lists | Source: Transcripts | Date: Custom

13 Synonyms | Industries | Annotations | More Filters »

Trends | More Trends »

Topic | More »

Cloud Computing
Revenue
Guidance
Partnerships

Analyst Questions

NVIDIA Corp
Cisco Systems Inc/Del...

01/01/2018 - 31/12/2021

Shows **List of Securities**, **Events Details**, and **Number of Mentions**

Show Details

Documents	Securities	Matches	Type	Time
FuelCell Energy Inc: Q4 2021 Earnings Call	FCEL US Equity	2	Earnings Call	12/29/21
Skillsoft Corp: Acquisition of Codecademy by Skillsoft	SKIL US Equity	1	M&A Call	12/22/21
Paychex Inc: Q2 2022 Earnings Call	PAYX US Equity	1	Earnings Call	12/22/21
BlackBerry Ltd: Q3 2022 Earnings Call	BB CN Equity	6	Earnings Call	12/22/21
CalAmp Corp: Q3 2022 Earnings Call	CAMP US Equity	1	Earnings Call	12/21/21
FactSet Research Systems Inc: Q1 2022 Earnings Call	FDS US Equity	4	Earnings Call	12/21/21
Micron Technology Inc: Q1 2022 Earnings Call	MU US Equity	2	Earnings Call	12/21/21
Braze Inc: Q3 2022 Earnings Call	BRZE US Equity	4	Earnings Call	12/20/21
Micron Technology Inc: Q1 2022 Earnings Call	MU US Equity	2	Earnings Call	12/20/21
Optical Cable Corp: Q4 2021 Earnings Call	OCC US Equity	2	Earnings Call	12/20/21
Sesa SpA: S1 2022 Earnings Call	SES IM Equity	4	Earnings Call	12/20/21
Enghouse Systems Ltd: Q4 2021 Earnings Call	ENGH CN Equity	13	Earnings Call	12/17/21

Second Level: Screen for Company Exposure

Options | Settings | Export | Document Search & Analytics

Search: aws or azure or google cloud | Securities/Lists | Source: Transcripts | Date: Custom

13 Synonyms | Industries | Annotations | More Filters »

Trends | More Trends »

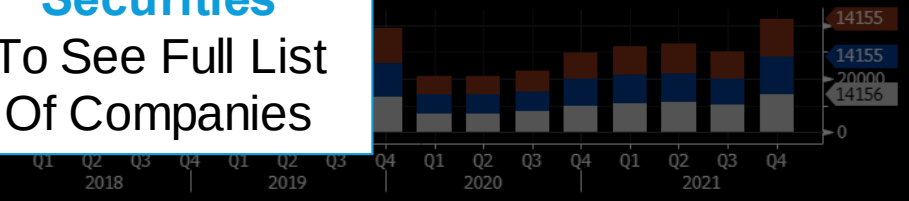
Topic | More »
- Cloud Computing
- Revenue
- Guidance
- Partnerships

Transcript Remarks | »
- Prepared Remarks
- Mgmt Answers
- Analyst Questions

Securities | More »
- salesforce.com Inc
- Arista Networks Inc
- NVIDIA Corp
- Cisco Systems Inc/Del...

Click On **'Securities'** To See Full List Of Companies

01/01/2018 - 31/12/2021



Show Details

Documents	Securities	Matches	Type	Time
FuelCell Energy Inc: Q4 2021 Earnings Call	FCEL US Equity	2	Earnings Call	12/29/21
Skillsoft Corp: Acquisition of Codecademy by Skillsoft	SKIL US Equity	1	M&A Call	12/22/21
Paychex Inc: Q2 2022 Earnings Call	PAYX US Equity	1	Earnings Call	12/22/21
BlackBerry Ltd: Q3 2022 Earnings Call	BB CN Equity	6	Earnings Call	12/22/21
CalAmp Corp: Q3 2022 Earnings Call	CAMP US Equity	1	Earnings Call	12/21/21
FactSet Research Systems Inc: Q1 2022 Earnings Call	FDS US Equity	4	Earnings Call	12/21/21
Micron Technology Inc: Q1 2022 Earnings Call	MU US Equity	2	Earnings Call	12/21/21
Braze Inc: Q3 2022 Earnings Call	BRZE US Equity	4	Earnings Call	12/20/21
Micron Technology Inc: Q1 2022 Earnings Call	MU US Equity	2	Earnings Call	12/20/21
Optical Cable Corp: Q4 2021 Earnings Call	OCC US Equity	2	Earnings Call	12/20/21
Sesa SpA: S1 2022 Earnings Call	SES IM Equity	4	Earnings Call	12/20/21
Enghouse Systems Ltd: Q4 2021 Earnings Call	ENGH CN Equity	13	Earnings Call	12/17/21

Second Level: Screen for Company Exposure

Options | Settings | Export

Search

aws or azure or google cloud

13 Synonyms | Industries | Annotations | More Filters »

Trends | More Trends »

Topic | More »
- Cloud Computing
- Revenue
- Guidance
- Partnerships

Transcript Remarks | »
- Prepared Remarks
- Mgmt Answers
- Analyst Questions

Securities | More »
- salesforce.com Inc
- Arista Networks Inc
- NVIDIA Corp
- Cisco Systems Inc/Del...

Show Details

Documents

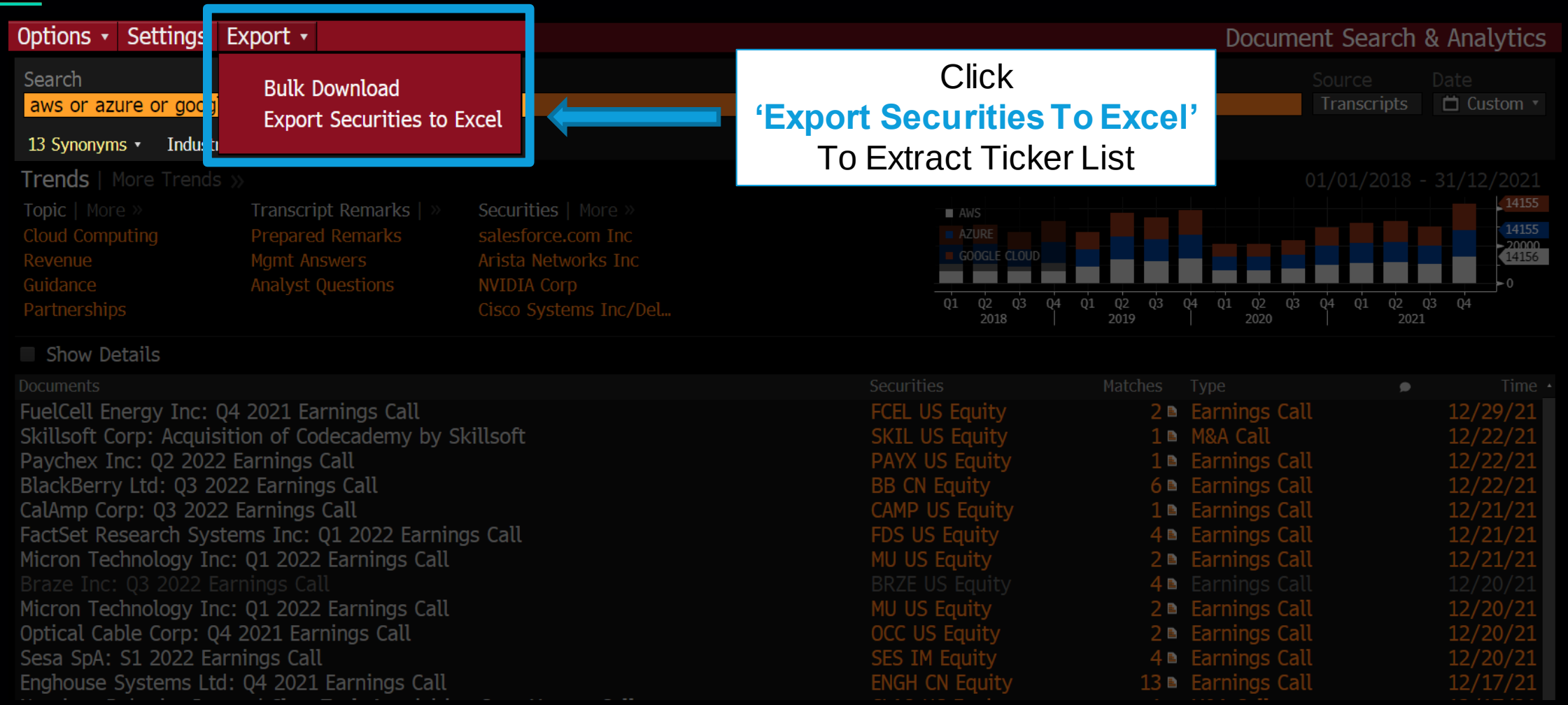
- FuelCell Energy Inc: Q4 2021 Earnings Call
- Skillsoft Corp: Acquisition of Codecademy by Skillsoft
- Paychex Inc: Q2 2022 Earnings Call
- BlackBerry Ltd: Q3 2022 Earnings Call
- CalAmp Corp: Q3 2022 Earnings Call
- FactSet Research Systems Inc: Q1 2022 Earnings Call
- Micron Technology Inc: Q1 2022 Earnings Call
- Braze Inc: Q3 2022 Earnings Call
- Micron Technology Inc: Q1 2022 Earnings Call
- Optical Cable Corp: Q4 2021 Earnings Call
- Sesa SpA: S1 2022 Earnings Call
- Enghouse Systems Ltd: Q4 2021 Earnings Call

Choose Securities

<Filter>

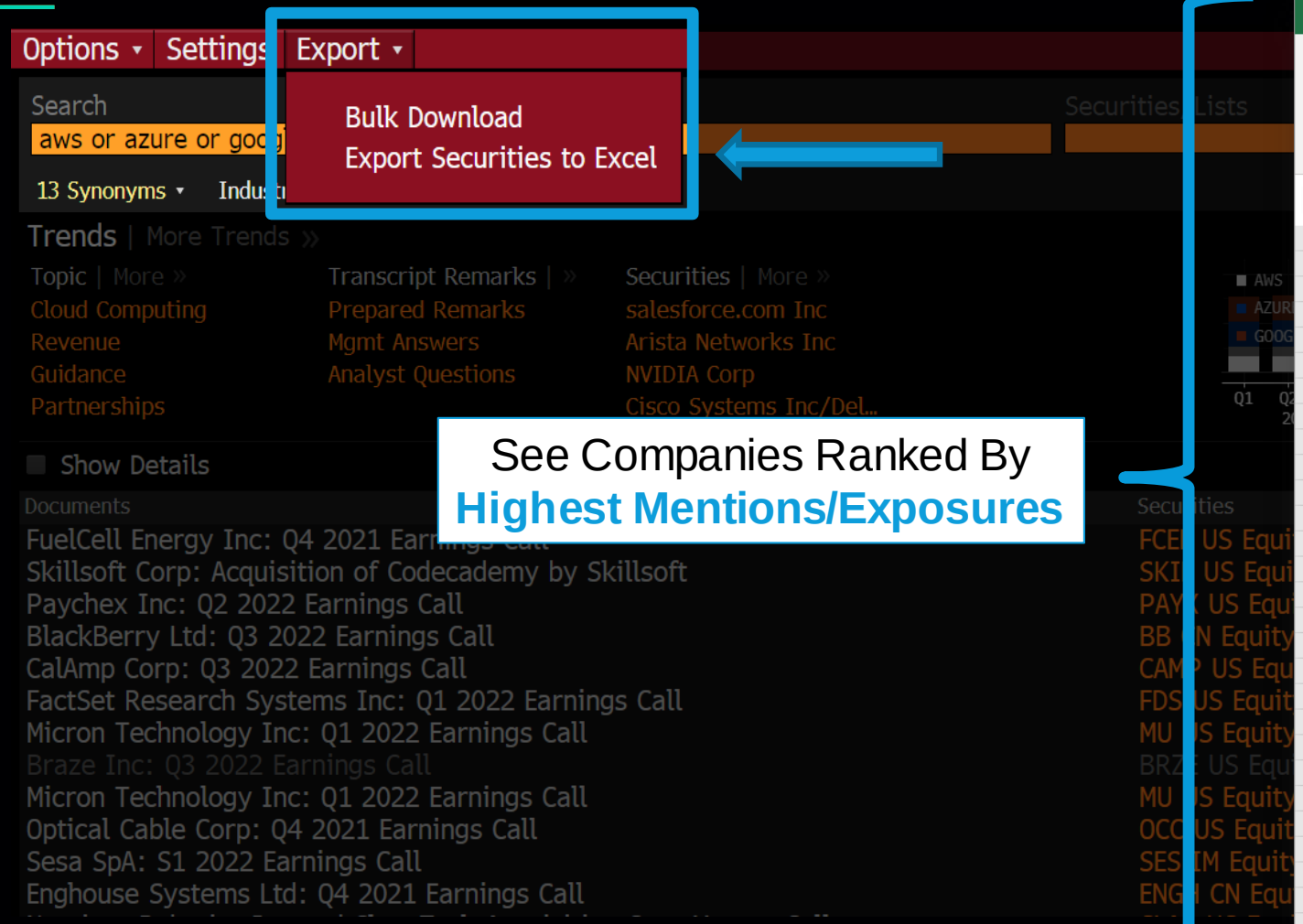
- salesforce.com Inc
- Arista Networks Inc
- NVIDIA Corp
- Cisco Systems Inc/Delaware
- Equinix Inc
- Juniper Networks Inc
- VMware Inc
- Intel Corp
- Fortinet Inc
- Zendesk Inc
- Microsoft Corp
- Proofpoint Inc
- Mandiant Inc
- Digital Realty Trust Inc
- Nutanix Inc
- NetApp Inc

Second Level: Screen for Company Exposure

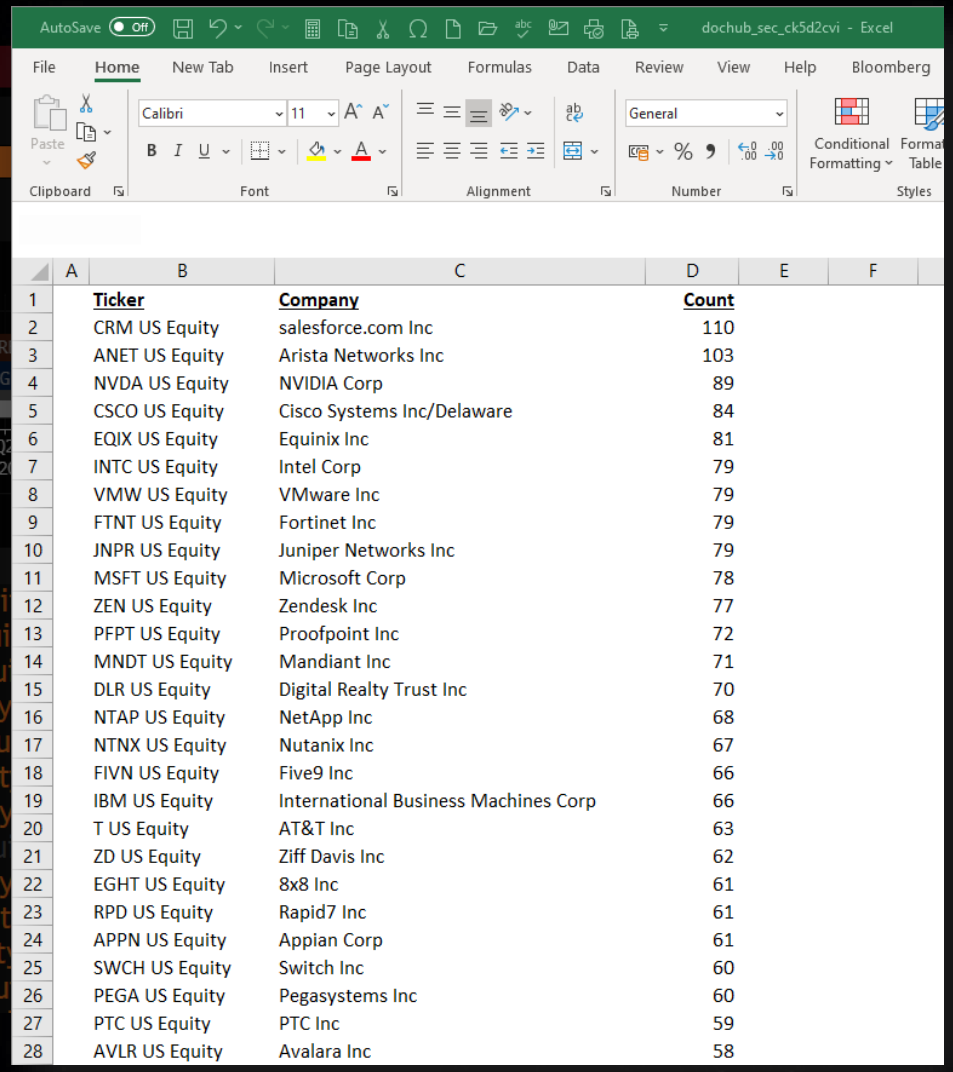


Click
'Export Securities To Excel'
To Extract Ticker List

Second Level: Screen for Company Exposure



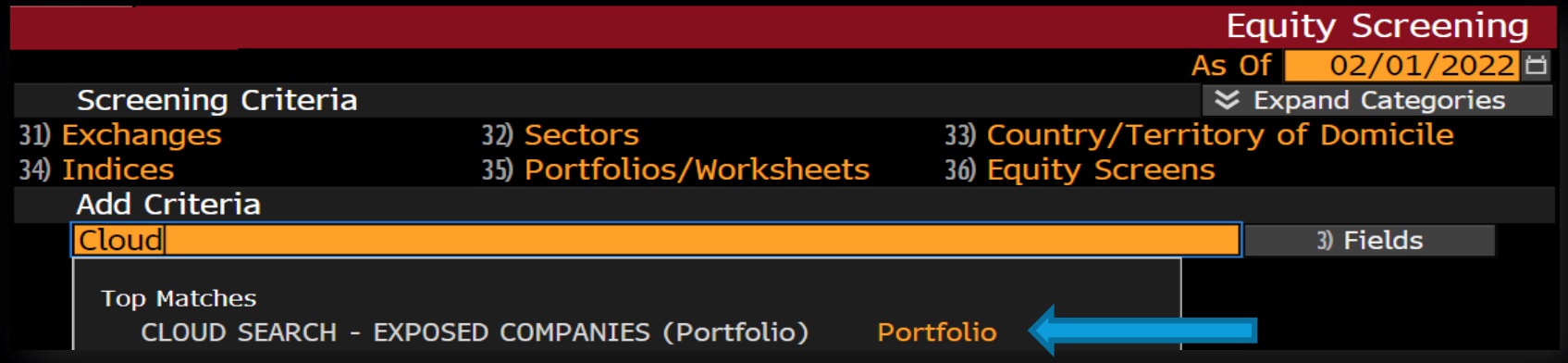
See Companies Ranked By
Highest Mentions/Exposures



	Ticker	Company	Count
2	CRM US Equity	salesforce.com Inc	110
3	ANET US Equity	Arista Networks Inc	103
4	NVDA US Equity	NVIDIA Corp	89
5	CSCO US Equity	Cisco Systems Inc/Delaware	84
6	EQIX US Equity	Equinix Inc	81
7	INTC US Equity	Intel Corp	79
8	VMW US Equity	VMware Inc	79
9	FTNT US Equity	Fortinet Inc	79
10	JNPR US Equity	Juniper Networks Inc	79
11	MSFT US Equity	Microsoft Corp	78
12	ZEN US Equity	Zendesk Inc	77
13	PFPT US Equity	Proofpoint Inc	72
14	MNDT US Equity	Mandiant Inc	71
15	DLR US Equity	Digital Realty Trust Inc	70
16	NTAP US Equity	NetApp Inc	68
17	NTNX US Equity	Nutanix Inc	67
18	FIVN US Equity	Five9 Inc	66
19	IBM US Equity	International Business Machines Corp	66
20	T US Equity	AT&T Inc	63
21	ZD US Equity	Ziff Davis Inc	62
22	EGHT US Equity	8x8 Inc	61
23	RPD US Equity	Rapid7 Inc	61
24	APPN US Equity	Appian Corp	61
25	SWCH US Equity	Switch Inc	60
26	PEGA US Equity	Pegasystems Inc	60
27	PTC US Equity	PTC Inc	59
28	AVLR US Equity	Avalara Inc	58

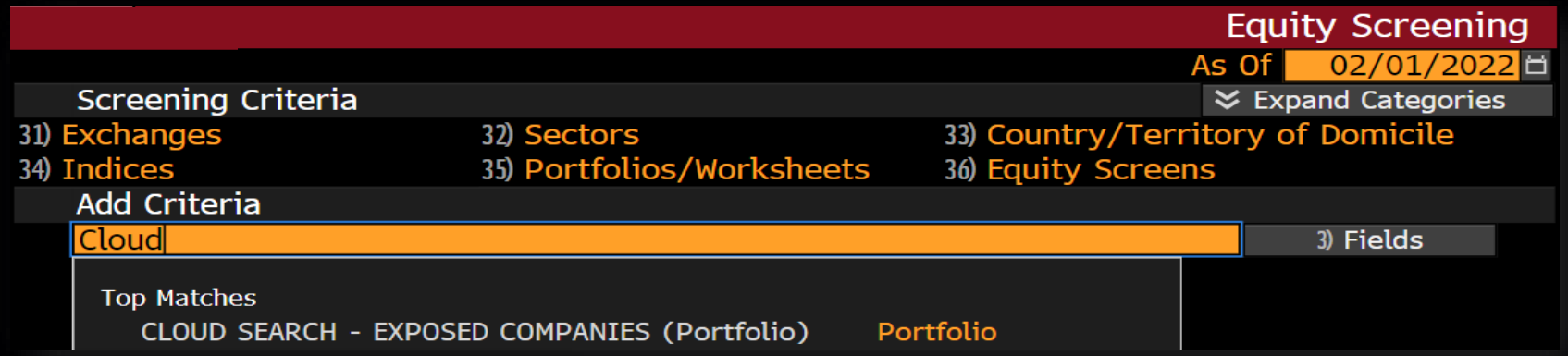
Third Level: Run Valuation Screens on Thematic Searches

Load Securities Into Equity Screener at **EQS <GO>**

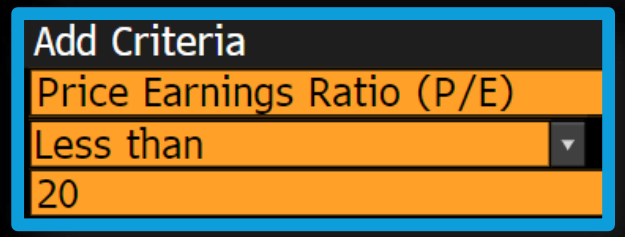


Third Level: Run Valuation Screens on Thematic Searches

Load Securities Into Equity Screener at **EQS <GO>**



Add Valuation Framework



Third Level: Run Valuation Screens on Thematic Searches

Load Securities Into Equity Screener at **EQS <GO>**

+

Add Valuation Framework

=

Nine 'Inexpensive' **Cloud Growth Stories**

Inexpensive Cloud Growth S | Actions | Export | Settings | Watchlist Analytics

Screen Name Inexpensive Cloud Growth Stories

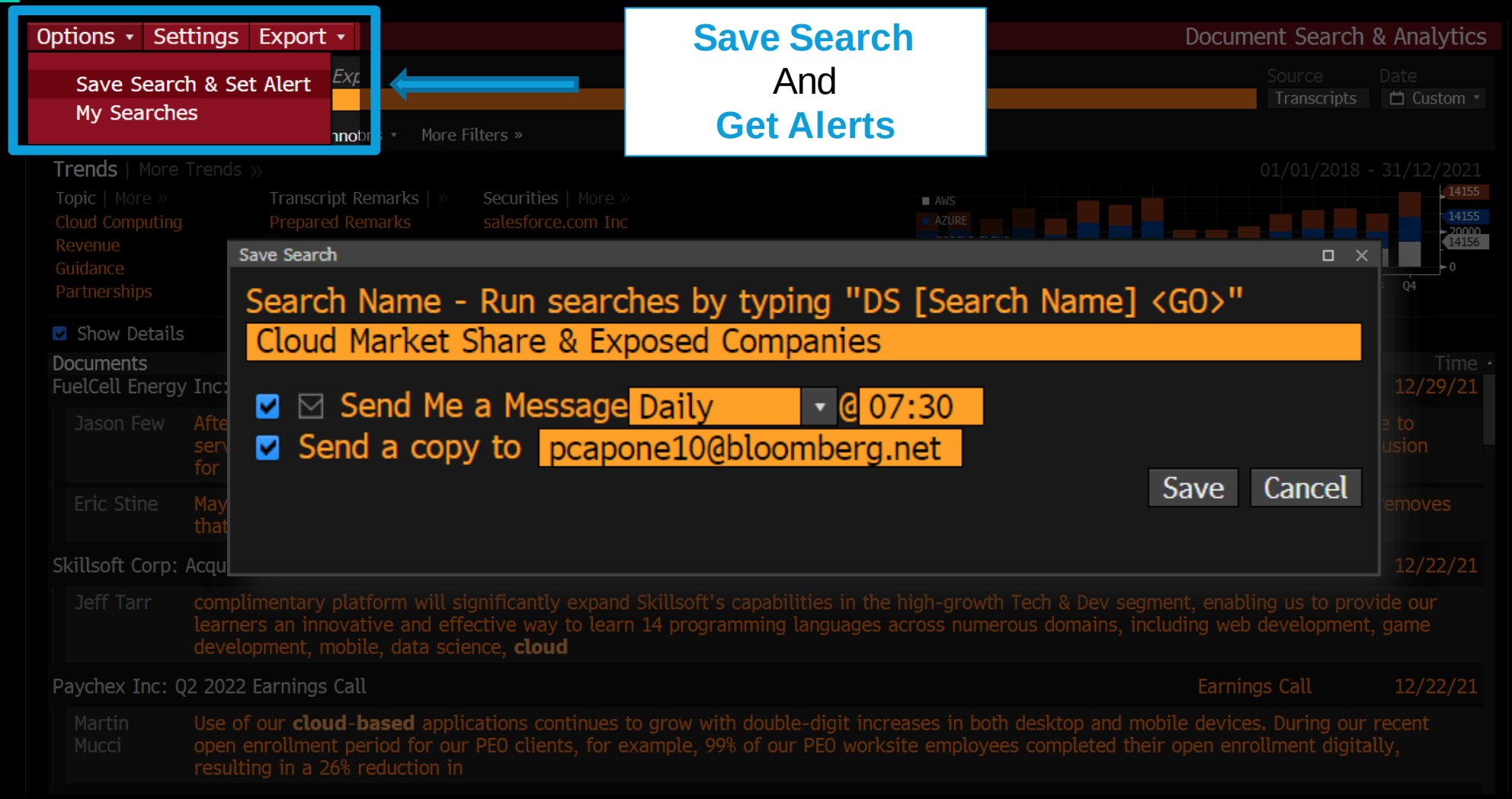
Refine By <Countries, Sectors, etc.> Group By Securities Show Hi/Lo As of 02/01/2022

Overview | Returns | Valuation | Estimates | Actuals | Credit | Technicals | Custom | Results

Page 1

Name	P/E	Market Cap	Price:D-1	Total Return YTD	Revenue T12M	EPS T12M
	<Enter Filter>					
Investable Universe (9)	12.04	74.90B	80.78	-6.10	56.58B	5.92
31) ZIFF DAVIS INC	19.25	5.07B	105.06	-5.23	1.74B	4.31
32) PEGASYSTEMS INC	16.68	8.10B	99.22	-11.27	1.19B	-0.26
33) INTL BUSINESS MACHINES C...	14.83	119.79B	133.57	-0.07	70.79B	6.41
34) MICRON TECHNOLOGY INC	11.48	92.12B	82.27	-11.68	29.62B	6.57
35) INTEL CORP	10.71	198.80B	48.82	-5.20	79.02B	4.90
36) DELL TECHNOLOGIES -C	9.56	43.40B	56.81	1.14	105.12B	8.92
37) ARROW ELECTRONICS INC	9.56	8.63B	124.00	-7.65	33.92B	13.20
38) WESTERN DIGITAL CORP	8.61	16.12B	51.74	-20.66	18.94B	6.45
39) AT&T INC	7.69	182.10B	25.50	5.71	168.86B	2.76

Save & Get Alerted



Save Search
And
Get Alerts

Exclusion Searches

Options ▾ Settings — Document Search & Analytics

Search: Search for Keyword, ? for Help — Securities/Lists — Source: Recommended — Date: All Dates ▾

Filings ▾ Industries ▾ Annotations ▾ Pages — More Filters » (1)

Document Search & Analytics: Ad

Source: Recommended (2) — All Dates ▾ — Language: English

Primary Filters
- Search Terms
- Securities
- Security Lists

More Filters
- Actions
- Annotations
- Asset Class
- Asset Type
- Author
- Communities
- Filings
- Industries
- Page Count
- Primary Research
- Providers
- Ratings
- Regions
- Remark Type
- Research Focus
- Research Topic
- RMS Owner
- Speaker
- Speaker Role

Search Terms

Search Builder | Free Form

Entire Document | Headlines Only | Annotations Only

Any of these (OR): TESLA × (3)

All of these (AND): Find documents containing all of the keywords

None of these (NOT): Find documents containing none of the keywords

Securities

Any of these (OR): Find documents containing any of the securities

All of these (AND): Find documents containing all of the securities

None of these (NOT): TSLA US Equity × (4)

Security Lists

Any of these (OR): Find documents containing any of the security lis — Browse Security Lists

NOT SECURITIES: TSLA US Equity AND KEYWORDS: TESLA*

Run Search | Save Search | Save a Copy | Cancel

What is the street saying about Tesla EXCLUDING Tesla

Options ▾ | Settings | Export ▾ | Document Search & Analytics

Search
NOT SECURITIES: TSLA US Equity AND KEYWORDS: TESLA* AND INDUSTRIES: Automobiles

Source: Transcripts | Date: All Dates ▾

Edit Search » | Alert | Clear

☑ Show Details

Documents	Type	Time
Internal Research and Top Ranked Documents | More Internal Research »		
General Motors Co: Evercore ISI 2nd Annual Technology, Media and Telecom Conference	Conf Presentation ...	09/08/22
Travis Katz — I think as we all learned watching the growth of **Tesla**, that it is -- it is hard to go from a few units to scaling and Elon Musk tweets about this constantly about it, it was very, very hard to scale.		
Fisker Inc: Cowen 15th Annual Global Transportation & Sustainable Mobility Conference	Conf Presentation ...	09/08/22
Henrik Fisker — But if you put that in perspective, if we produce just 40,000 vehicles next year, we will be the fastest growing EV company in history in terms of the first-year production, including **Tesla**.		
Bayerische Motoren Werke AG: Q2 2022 Earnings Call	Earnings Call	08/03/22
Charles Coldicott — And then my second question, you referenced in your prepared remarks the BMW iX tests that showed the real life range is significantly longer than the official range and also uses less energy per mile than all of its competitors, including the **Tesla** Model X. Obviously, you model -- you design and manufacture your own powertrain components for that model.		
Tim Rokossa — Now, lots of demand is a good problem, but it's still a problem because lots of your customers may end up still buying **Tesla** if this 2 years is simply too long for them to wait.		
Stephen Reitman — We see in Shanghai, **Tesla** making record (inaudible) production there from Shanghai Gigafactory. I was wondering how the efficiency of your plants compare -- your three plants in the Shenyang area compare in terms of ability to work, how many days and shifts and things like that?		
Fisker Inc: Morgan Stanley 10th Annual Laguna Conference	Conf Presentation ...	09/15/22

Natural Language Detection

Options ▾ Settings Export ▾ Document Search & Analytics

Search: 10k or 10q cybertruck

Securities/Lists: TSLA US Equity ×

Source: Company Documents

Date: All Dates ▾

0 Synonyms ▾ Filings: 10-Q; 10-K ▾ Industries ▾ Annotations ▾ More Filters » Alert Clear

Show Details

Documents	Type	Time
Internal Research and Top Ranked Documents | More Internal Research »		
Tesla Inc: 10-Q 2022/07/25	10-Q	07/25/22
Gigafactory Shanghai Model 3 / Model Y Active ... Gigafactory Berlin-Brandenburg Model Y Active ... Gigafactory Texas Model Y **Cybertruck** Active In development ... TBD Tesla Semi In development ... TBD Tesla Roadster In development ...		
Tesla Semi, **Cybertruck** and the new Tesla Roadster; and future features and services based on artificial intelligence, such as new Autopilot or FSD functionalities, the autonomous Tesla ride-hailing network and robotics.		
Tesla Inc: 10-Q 2022/04/25	10-Q	04/25/22
Roof; new product versions or variants such as the updated Model S and Model X; new vehicles such as Tesla Semi, **Cybertruck** and the new Tesla Roadster; and future features and services based on artificial intelligence, such as new Autopilot or FSD		
Gigafactory Shanghai Model 3 / Model Y Active ... Gigafactory Berlin Model Y Active ... Gigafactory Texas Model Y **Cybertruck** Active In development ... TBD Tesla Semi In development ... TBD Tesla Roadster In development ...		
Tesla Inc: 10-K 2022/02/07	10-K	02/07/22
product versions or variants such as the recently updated Model S and Model X; new vehicles such as Tesla Semi, **Cybertruck** and the new Tesla Roadster; and future features and services based on artificial intelligence, such as new Autopilot or FSD 14		
We have also announced several planned electric vehicles to address additional		

Natural Language Detection with spell check

Options ▾ Settings Export ▾ Document Search & Analytics

Search: bankrupty 10 k or 10q

Securities/Lists: COIN US Equity ×

Source: Company Documents

Date: All Dates ▾

0 Synonyms ▾ Filings: 10-Q; 10-K ▾ Industries ▾ Annotations ▾ More Filters » Alert Clear

Did you mean **bankruptcy 10 k or 10 q**

No matches found. Modify your search criteria to find more results.

Options ▾ Settings Export ▾ Document Search & Analytics

Search: bankruptcy 10 k or 10 q

Securities/Lists: COIN US Equity ×

Source: Company Documents

Date: All Dates ▾

3 Synonyms ▾ Filings: 10-Q; 10-K ▾ Industries ▾ Annotations ▾ More Filters » Alert Clear

Show Details

Documents	Matches	Type	Date	Period	Page Size	DOC ID	LANGUAGE
Internal Research and Top Ranked Documents | More Interna							
Coinbase Global Inc: 10-Q 2022/08/09		10-Q	08/09/22	06/30/22	12M	000167978...	X English
Coinbase Global Inc: 10-Q 2022/05/10	9	10-Q	05/10/22	03/31/22	10M	000167978...	X English
Coinbase Global Inc: 10-K 2022/02/25	6	10-K	02/25/22	12/31/21	15M	000167978...	X English
Coinbase Global Inc: 10-Q 2021/11/10	6	10-Q	11/10/21	09/30/21	12M	000167978...	X English
Coinbase Global Inc: 10-Q 2021/08/11	6	10-Q	08/11/21	06/30/21	11M	000167978...	X English
Coinbase Global Inc: 10-Q 2021/05/14	6	10-Q	05/14/21	03/31/21	10M	000167978...	X English

Speech to Text – coming this Fall – Live tracking & speech to text

Options ▾ Settings Export ▾ Document Search & Analytics

Search: revenue | Securities/Lists | Source: Transcripts | Date: All Dates ▾

6 Synonyms ▾ Industries ▾ Annotations ▾ Remark Type ▾ Transcript Type ▾ More Filters » Clear

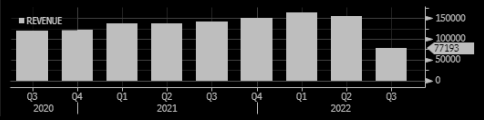
Mentions Last 24 Months

Topic | More »
- Revenue
- Guidance
- Margins
- EBITDA

Transcript Remarks | »
- Prepared Remarks
- Mgmt Answers
- Analyst Questions

Securities | More »
- ZoomInfo Technologies...
- IGO Ltd
- Persimmon PLC
- Remy Cointreau SA

Trends More Trends »



Show Details

Hindustan Foods Ltd: Q1 2023 Earnings Call — LIVE Earnings Call 10:13 AM

Sameer Kothari	We have achieved our highest ever **turnover** and profitability numbers on a consolidated basis and given that the ice cream facility and the RB (inaudible) facility that we've talked about before, we'll start contributing significantly to these numbers in the coming quarters.
Sameer Kothari	While in terms of the **turnover**, it didn't contribute much in this quarter, it was a tough and [ph]offset[/ph] full startup. Right from managing a complex procurement to manufacturing and commercializing all the formats of ice cream, sticks, cones, cups and party packs.
Ganesh Argekar	The new color cosmetic accretion was completely integrated and the achieved its highest ever **turnover** in this quarter.We have started manufacturing host of new products at the facility and we are confident that this unit will be able to service the growing because of the customer.

15 more excerpts

Monde Nissin Corp: Q2 2022 Earnings Call — LIVE Earnings Call 10:13 AM

Henry Soesanto	The first half of the year has been strong **top-line** growth. For our APAC business growth is across all major categories while our Meat Alternative business continues to face challenges in retail, it continues its strong momentum in food service making these channel are a more significant part of its overall business.
Jesse Teo	First of all, on the network front, the affected geographies are immaterial. Less than 0.2% of that **turnover** of the group of APAC branded food and beverage.
Jesse Teo	We believe that there should be, there would be a dampening effect on our overall Q2 results because of this incident, because of the marketing and **sales** interventions that we're making to give assurance and provide good, there are imports goodwill with our consumers.

7 more excerpts

LEG Immobilien SE: Q2 2022 Earnings Call — LIVE Earnings Call 10:13 AM

Lars Von Lackum	Therefore, you should expect us to become a net seller this year. In order to safeguard our FFO one target which as always neither includes acquisitions no **sales**, we will try to steer transfer of ownership for the **sales** to the end of this year.
Lars Von Lackum	We are seeing in the transaction markets, is that the portfolio is being traded I'll becoming much smaller so region of focus is of utmost importance, the type of asset is of utmost importance and all the other topics which real estate guy

Using DS <GO>: AI Topic Overviews

BEVO DSDM | DS Document Search | DS Document Search | MSG Inbox | Options

MENU OUT Team Other Time MMM ARAP Jira RESM DRQS FTAM BLP Hub QATB CMPN ZOOM QADN

TESLA INC Equity | DS | Related Functions Menu | Message

<Back> to Return

Options | Settings | Export | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists: TSLA US Equity | Source: Transcripts | Date: All Dates

Industries | Annotations | Remark Type | Transcript Type | More Filters » | Alert

Mentions

Topic | More »
- Batteries
- Supply Chain
- China
- Electric Vehicles

Transcript Remarks | »
- Mgmt Answers
- Prepared Remarks
- Analyst Questions

Transcript Types | »
- Earnings Call
- Shareholder Mtg Call

Last 24 Months

Trends | More Trends »

Trending Up

Orders	+300%
Environment (ESG)	+200%
New Products	+200%

Show Details

Documents	Type	Date
Internal Research and Top Ranked Documents | More Internal Research »		
Tesla Inc: Q2 2022 Earnings Call	Earnings Call	07/20/22
Tesla Inc: Q1 2022 Earnings Call	Earnings Call	04/20/22
Tesla Inc: Q4 2021 Earnings Call	Earnings Call	01/26/22
Tesla Inc: Q3 2021 Earnings Call	Earnings Call	10/20/21
Tesla Inc: Annual General Meeting	Shareholder Mtg Call	10/08/21
Tesla Inc: Q2 2021 Earnings Call	Earnings Call	07/26/21
Tesla Inc: Q1 2021 Earnings Call	Earnings Call	04/26/21
Tesla Inc: Q4 2020 Earnings Call	Earnings Call	01/28/21
Tesla Inc: Q3 2020 Earnings Call	Earnings Call	10/21/20
Tesla Inc: Annual General Meeting	Shareholder Mtg Call	09/23/20
Tesla Inc: Q2 2020 Earnings Call	Earnings Call	07/22/20
Tesla Inc: Q1 2020 Earnings Call	Earnings Call	04/30/20
Tesla Inc: Q4 2019 Earnings Call	Earnings Call	01/30/20
Tesla Inc: Solar Roof Conference Call Webcast	M&A Call	10/25/19
Tesla Inc: Q3 2019 Earnings Call	Earnings Call	10/24/19
Tesla Inc: Q3 2019 Earnings Call	Earnings Call	10/23/19
Tesla Inc: Canaccord Genuity Future of Transport Conference	Conf Presentation Call	08/06/19
Tesla Inc: Q2 2019 Earnings Call	Earnings Call	07/25/19
Tesla Inc: Q2 2019 Earnings Call	Earnings Call	07/24/19
Tesla Inc Annual Shareholders Meeting	Shareholder Mtg Call	06/11/19

Suggested Functions | **MA** Explore merger & acquisition activity | **CMDS** Track commodity price movement

Using DS <GO>: AI Topic Overviews

Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists: TSLA US Equity × | Source: Transcripts | Date: Last 2 Years ▾

Industries ▾ Annotations ▾ Remark Type ▾ Transcript Type ▾ More Filters » Alert

Trends

Search > Trends

Period Quarterly ▾

Largest Mentions		New Mentions		Trending Up		Trending Down	
Supply Chain	Q3 2022	Cryptocurrency	Q3 2022	Orders	+300%	Revenue	-100%
Material Costs	Q2 2022	Consumer Demand	Q3 2022	Environment (ESG)	+200%	Labor Costs	-100%
Supply Chain	Q1 2022	Partnerships	Q3 2022	New Products	+200%	Research & Develo...	-100%

Filter by Category None Selected ▾ Group by Category

Topic	Total Mentions	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022 ↓
Supply Chain	122	22	2	8	7	18	18	14	13	20
Batteries	206	82	15	14	15	9	30	6	16	19
China	77	11	6	6	6	6	11	5	13	13
Pricing	55	4	4	4		5	18	4	7	9
Lithium	47	16	5		3	2	1	1	10	9
Inflation	19			1				2	8	8
Headwinds	31	2	2		5	3	6	4	4	5
Backlog	13	1			1	2	1	1	2	5
Cryptocurrency	10				5					5
Electric Vehicles	60	20	4	6	3	6	13	1	3	4
Material Costs	57	15	1	1	3	3	6	6	18	4
Supply Chain Disruptions	27	2		1	3	4	4	7	2	4
Chip Shortages	20			1	1	2	4	6	2	4
Orders	11	2	2			1	1		1	4
Cash Flow	22	4	4	2	3	1	1	1	3	3
Environment (ESG)	41	19	1	1	3	2	8	3	1	3

Using DS <GO>: AI Topic Overviews

Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists: TSLA US Equity × | Source: Transcripts | Date: Last 2 Years ▾

Industries ▾ | Annotations ▾ | Remark Type ▾ | Transcript Type ▾ | More Filters » | Alert

Trends

Search > Trends

Period Quarterly ▾

Largest Mentions		New Mentions		Trending Up		Trending Down	
Supply Chain	Q3 2022	Cryptocurrency	Q3 2022	Orders	+300%	Revenue	-100%
Material Costs	Q2 2022	Consumer Demand	Q3 2022	Environment (ESG)	+200%	Labor Costs	-100%
Supply Chain	Q1 2022	Partnerships	Q3 2022	New Products	+200%	Research & Develo...	-100%

Filter by Category None Selected ▾ ■ Group by Category

Topic	Total Mentions	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022 ↓
Supply Chain	122	22	2	8	7	18	18	14	13	20
Batteries	[illegible]	82	15	14	15	9	30	6	16	19
China										
Pricing										
Lithium										
Inflation										
Headwinds										
Backlog										
Cryptocurr										
Electric Vel										
Material Co										
Supply Cha										
Chip Short										
Orders										
Cash Flow										
Environmer										

Document Search & Analytics

Search > Trends > Result: Cryptocurrency

5 excerpts across 1 document

Documents	Type	Time
Tesla Inc: Q2 2022 Earnings Call	Earnings Call	07/20/22

Zachary Kirkhorn	Additionally, we converted a majority of our **Bitcoin** holdings to Fiat for a realized gain offset by impairment charges on the remainder of our holdings, netting a $106 million cost to the P&L included within Restructuring and Other.
Elon Musk	Yes. It should be mentioned that the reason we sold a bunch of **Bitcoin** holdings was that we were uncertain as to when the COVID lockdowns in China would alleviate.
Elon Musk	We still have our **Dogecoin**.
Martin Viecha	Thank you. The next question is, you made the right economic call before most on inflation when you diversified into **Bitcoin**. It has since shown it's not much of a hedge in the real world test the last few months.
Elon Musk	Well, Tesla is a -- Tesla's goal is to accelerate the advent of sustainable energy. We're not really -- **crypto currency** is a sideshow to the sideshow. So we're not -- of course, **cryptocurrency** is not something we think about a lot.

Less excerpts...

Using DS <GO>: Industry / Portfolio Topic Overviews

Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists | Source: Transcripts | Date: Last 2 Years

Industries: Automobiles ▾ | Annotations ▾ | Remark Type ▾ | Transcript Type ▾ | More Filters » | Alert | Clear

Topic	Total Mentions	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
Electric Vehicles	5.3k	333	556	737	580	581	704	680	624	476
Revenue	3.8k	381	370	473	359	352	562	412	456	453
Batteries	3.2k	247	307	469	367	379	394	409	397	274
Guidance	3k	277	246	367	347	353	414	376	324	271
Supply Chain	2.4k	136	149	186	240	195	317	349	495	304
China	2.1k	227	243	304	202	201	200	209	271	228
New Products	1.9k	196	156	237	173	201	235	238	229	205
Margins	1.6k	124	154	192	171	190	168	184	210	173
Pricing	1.6k	85	119	155	159	163	200	202	275	203
Material Costs	1.5k	83	89	140	169	147	183	214	316	200
Partnerships	1.5k	126	127	205	182	146	208	191	129	147
Competition	1.4k	155	156	216	178	138	161	166	138	132
Research & Development (R&D)	1.3k	105	122	206	157	155	148	190	114	72
Cash Flow	1.2k	139	136	172	133	102	118	121	136	113
Market Share	1.1k	95	134	136	111	117	120	155	98	96
Inventory	1k	136	122	90	140	118	82	67	138	141

Research Analytics

Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists: TSLA US Equity × | Source: Research | Date: Last 2 Years

Primary ▾ | Industries ▾ | Providers: Morgan Stanley ▾ | Research Actions ▾ | Ratings ▾ | Annotations ▾ | Pages ▾ | Asset Class ▾ | More Filters » | Alert | Clear

Trends

Search > Trends

Period Quarterly ▾

Largest Mentions		New Mentions		Trending Up		Trending Down	
Margins, EBITDA, Batteries, ...	Q3 2022	Energy Transition	Q3 2022	Market Share	+200%	Operating Margin	-100%
EBITDA	Q2 2022	Automation	Q3 2022	Environment (ESG)	+100%	COVID-19	-100%
EBITDA	Q1 2022	Consumer Confidence	Q3 2022	Solar	+100%	New Products	-100%

Filter by Category None Selected ▾ ■ Group by Category

Topic	Total Documents	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
Margins	126	20	10	17	16	16	14	15	12	6
Competition	122	20	10	17	16	16	14	13	11	5
EBITDA	121	20	9	15	13	15	14	16	13	6
Batteries	119	16	7	17	16	16	14	15	12	6
China	111	17	8	14	16	14	12	13	11	6
Average Revenue Per User (ARPU)	105	5	4	17	16	16	14	15	12	6
Revenue	80	13	6	7	8	12	10	9	9	6
Supply Chain	51	9	8	4	5	5	4	7	6	3
Monthly Active Users (MAU)	48	2	3	1		2	7	15	12	6
Driverless	39	5	4	5	7	6	4	4	2	2
Operating Margin	35	20	8	1	1	2	1	1	1	
Market Share	35	5	5	4	6	4	3	4	1	3
Regulation	29	9	3	4	3	4	3	1	1	1
Pricing	29	6	3	3	2	5	2	2	5	1
Cash Flow	27	5	5	3	3		3	2	4	2
COVID-19	25	17	6	1					1	

le Solutions

Research Analytics

Export ▾ | Document Search & Analytics

Search: Search for Keyword, ? for Help | Securities/Lists: TSLA US Equity × | Source: Research | Date: Last 2 Years

Primary ▾ | Industries ▾ | Providers: Morgan Stanley ▾ | Research Actions ▾ | Ratings ▾ | Annotations ▾ | Pages ▾ | Asset Class ▾ | More Filters » | Alert | Clear

Trends

Search > Trends

Period Quarterly ▾

Largest Mentions	New Mentions	Trending Up	Trending Down
Margins, EBITDA,			
EBITDA			
EBITDA			

Document Search & Analytics

Search > Trends > Result: Driverless

Filter by Category

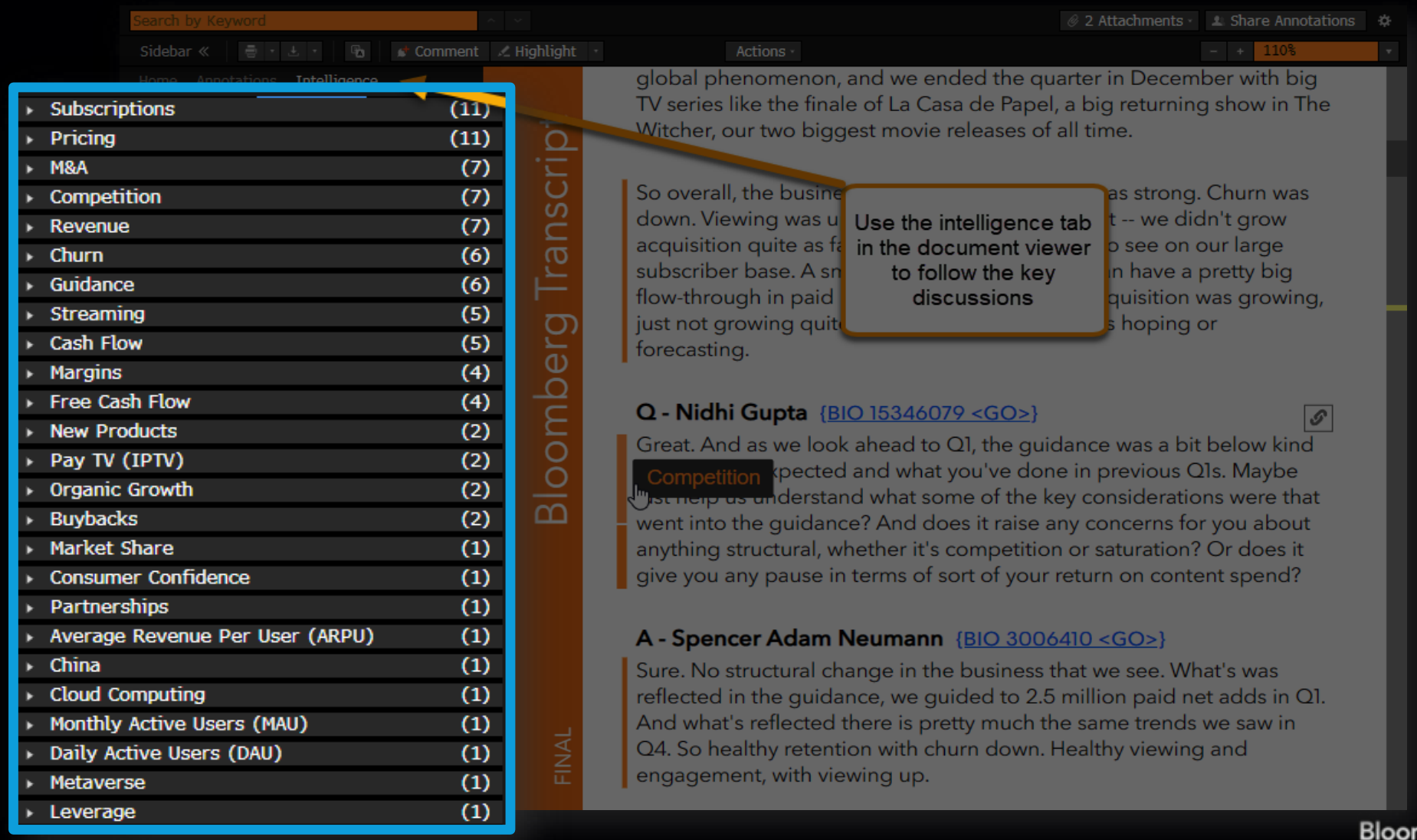
Excerpts across 39 documents

Topic
Margins
Competition
EBITDA
Batteries
China
Average Revenue
Revenue
Supply Chain
Monthly Active U
Driverless
Operating Margin
Market Share
Regulation
Pricing
Cash Flow
COVID-19

Documents	Type	Time
Tesla Inc: 4th Annual Intern Survey: Tesla Still Tops, but Less Cool Now?	Morgan Stanley	08/11/22
Page 1 — If the **car drives itself...** will you ride in it? 74% of our interns expect **fully** ... **autonomous cars** will be a viable public **transport** option by 2032. They seem to ... have strong conviction on this point, as 29% of some of the interns don't even ...		
Page 1 — Exhibit 3: When do you expect to see the first **fully autonomous cars** available as a ... viable public **transport** option (with no safety **driver**)?		
Page 1 — this year don't have a desired auto brand (17% vs. 11% last year) or cited Other ... (12% vs. 7%). Mercedes (17%), Audi (12%) and BMW (11%) followed Tesla. Tesla ... also ticked down (39% last year to 35% this year) as most trusted for ... **autonomous** service.		
2 more excerpts		
Tesla Inc: Do Investors Appreciate the Tesla China Risks?	Morgan Stanley	08/02/22
Page 1 — Future connected/**autonomous transport** entails 'dual-purpose' ... technology that governments will find highly sensitive. Robotics, sensing ... and computing, software/network/AI – all run on a shared utility-like ...		
Page 1 — **transport** network that resembles the end state of a public utility. We ... think it will ultimately be regulated as one, dominated		

Using DS <GO>: Intelligent Document Summary Topics

Using DS <GO>: Intelligent Document Summary Topics



Using DS <GO>: Company Analytics

Export ▾ | Document Search & Analytics

Search: metaverse product | Securities/Lists | Source: Research | Date: Last 2 Years

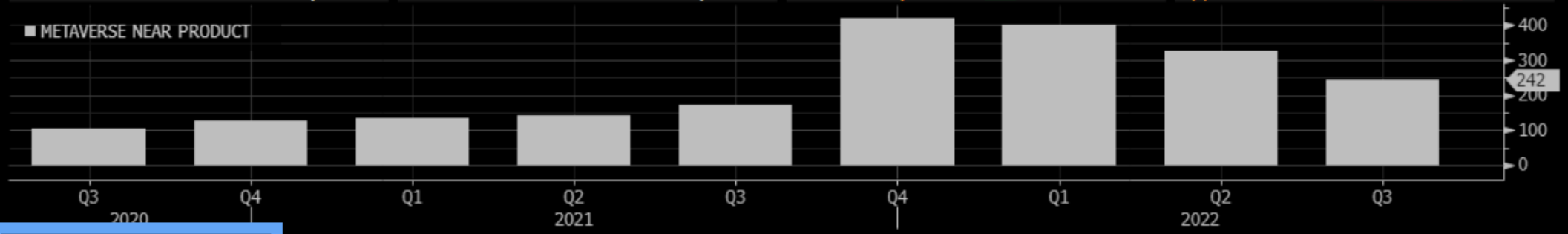
14 Synonyms ▾ | Primary ▾ | Industries ▾ | Providers ▾ | Research Actions ▾ | Ratings ▾ | Annotations ▾ | Pages ▾ | Asset Class ▾ | More Filters » | Alert | Clear

Trends

Search > Trends

Period Quarterly ▾

Largest Mentions		New Mentions		Trending Up		Trending Down	
Sunny Optical Technology G...	Q3 2022	Mango Excellent Media Co Ltd	Q3 2022	PTC Inc	+355%	Square Enix Holdin...	-100%
GameStop Corp	Q2 2022	TDK Corp	Q3 2022	Sunny Optical Tec...	+184%	Wayfair Inc	-100%
Meta Platforms Inc	Q1 2022	SK Telecom Co Ltd	Q3 2022	ROBLOX Corp	+127%	Apple Inc	-100%



Watchlist Analytics | WATC »

Company	Total Documents	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
Meta Platforms Inc	82	6	5	5	5	6	22	15	9	9
GameStop Corp	50		2				10	13	19	6
GoerTek Inc	35	5	5		3	7	5	2	5	3
Sunny Optical Technology Group Co Ltd	35			1	5	4	6	5	4	10
Microsoft Corp	34				6	5	8	11	3	1
PTC Inc	33	7	8	4	6	3			1	4
Snap Inc	24	1	4	7	3	2	1	2	3	1

e Solutions

Who are the main players around the drug ZANTAC?

Export ▾ | Document Search & Analytics

Search: zantac | Securities/Lists | Source: Research | Date: Last 2 Years

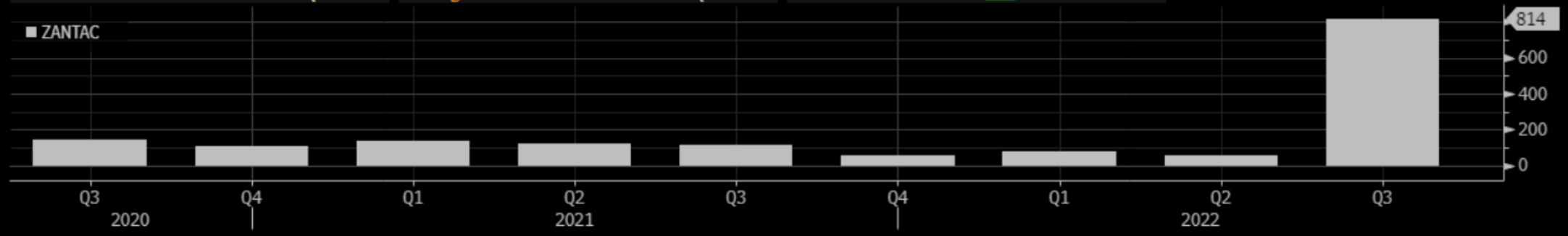
1 Synonyms ▾ | Primary ▾ | Industries ▾ | Providers ▾ | Research Actions ▾ | Ratings ▾ | Annotations ▾ | Pages ▾ | Asset Class ▾ | More Filters » | Alert | Clear

Trends

Search > Trends

Period Quarterly ▾

Largest Mentions		New Mentions		Trending Up		Trending Down	
Sanofi	Q3 2022	Haleon PLC	Q3 2022	GSK PLC	+1038%	Sawai Group Holdi...	-100%
Sanofi	Q2 2022	Teva Pharmaceutical Indust...	Q3 2022	Sanofi	+935%	JB Chemicals & Ph...	-9%
Sanofi	Q1 2022	Perrigo Co PLC	Q3 2022	Reckitt Benckiser ...	+355%		



Watchlist Analytics | WATC »

Company	Total Documents	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q2 2022	Q3 2022
Sanofi	253	25	27	19	26	15	19	21	10	91
GSK PLC	82	4	5	3	2	1		1	6	60
Haleon PLC	57							3		54
GlaxoSmithKline Pharmaceuticals Ltd	33	5	5	3	6	7	1	2	2	2
JB Chemicals & Pharmaceuticals Ltd	32	4	1	3	1	8	3	3	5	4
Strides Pharma Science Ltd	32	12	2	8	4	3	1			2
Teva Pharmaceutical Industries Ltd	18	1			3			1		13

Solutions

AI Relevancy Suggestions – Powering top search results

Options | Settings | Export | Document Search & Analytics

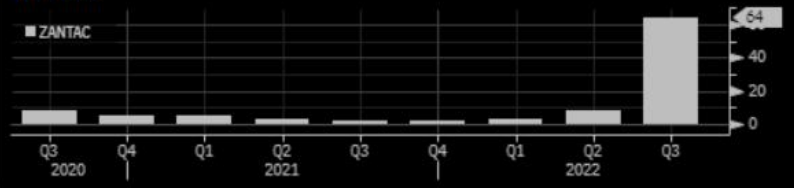
Search: zantac
Securities/Lists: GSK LN Equity
Source: Recommended
Date: Last 2 Years

1 Synonyms | Filings | Industries | Annotations | Pages | More Filters » | Alert | Clear

Mentions — Last 24 Months

Providers | More »	Securities | More »	Filings | More »
Deutsche Bank AG	Sanofi	6-K
BNP Paribas Exane	GlaxoSmithKline Capital..	Annual Report
Cowen		20-F
Sustainalytics		Prospectus

Trends



Show Details

Documents	Matches	Type	Page	Date
Internal Research and Top Ranked Documents | More Internal Research »				
GSK PLC: BofA Global Healthcare Conference	2	Conf Presentation Call		09/16/22
GSK.L: GSK - Upgrade to Neutral. Valuation provides support	10	Credit Suisse	16	09/15/22
GSK PLC: Prospectus 2022/09/09		Prospectus		09/09/22
CFRA Marketscope: GSK LN Stock Report	4	CFRA	9	09/17/22
SAN, GSK: Making life difficult for their big pharma peers (esp BMY)	6	Wolfe Research	8	09/16/22
GSK PLC: Key takeaways from our 2022 CEO Conference Call - Bullish on Shingrix, OA-RSV and Inj	4	JP Morgan	7	09/15/22
GSK plc: Separation of Haleon is not deleveraging but GSK is on growth trajectory, with some fina	2	Moody's	15	09/13/22
GSK: Weekly retail rx tracker	2	Deutsche Bank	15	09/12/22
GSK PLC (GSK.L): Liability Traps Share Price; Management Exuberant on Vaccines	1	Citi	9	09/12/22
Risk Rating: GlaxoSmithKline Capital Plc	8	Sustainalytics	79	09/09/22
EUROPE | Pharmaceuticals: - Back to School Blues; Downgrading GSK to Hold vs Sanofi Still Buy a	10	SBG Securities (Pty) L...	38	09/08/22
Risk Rating: GSK Plc	8	Sustainalytics	79	09/08/22
GSK: Weekly retail rx tracker	1	Deutsche Bank	15	09/07/22
GSK.LN: GSK.LN: Model Update Post 2Q Earnings	3	Guggenheim	5	09/07/22

Relevancy found the key issue, link to the press release announcing the litigation – Feeling the heartburn?

zantac 1/4

Sidebar « | Comment | Highlight | Pen | Clip | More | 9/109 | Automatic | Share Annotations

Home Annotations Search

90683.140594999424768.6941.pdf (7)

th August, 2022 (which can be accessed at the following hyperlink: https://www.gsk.com/en-gb/media/press-releases/statement-zantac-ranitidine-litigation/) (the "First Zantac Press Release"); and

Highlight

https://www.gsk.com/en-gb/media/press-releases/statement-zantac-ranitidine-us- litigation/) (the "Second Zantac Press Release", and together with the First Zantac Press

Highlight

Release, the "Zantac Press Releases"), save that any statement contained in a document which is deemed to be incorporated by reference herein

Highlight

49 and 27 respectively of the June Interim 2022 Financial Information and the Zantac Press Releases (which are incorporated by reference), there are no governmental, legal or arbitration proceedings, including any

Highlight

half-yearly financial report of the Group for the six-month period ended 30th June, 2022 (the "**June Interim 2022 Financial Information**");

(s) the section entitled "*Taxation*" set out on page 27 of the June Interim 2022 Financial Information;

(t) the audited annual financial statements of GSK Capital plc for the year ended 31st December, 2021 (which can be accessed from the following hyperlink: https://www.gsk.com/media/7662/gsk-capital-plc-annual-report-2021.pdf) and 31st December, 2020 (which can be accessed from the following hyperlink: https://data.fca.org.uk/artefacts/NSM/Portal/NI-000024017/NI-000024017.pdf);

(u) the interim management report dated 3 August, 2022 (which can be accessed from the following hyperlink: https://www.gsk.com/media/9402/2022-half-year-results-and-interim-management-report-glaxosmithkline-capital-plc.pdf), containing the unaudited financial statements for the six months ended 30th June, 2022 of GSK Capital plc;

(v) the press release dated 11th August, 2022 (which can be accessed at the following hyperlink: https://www.gsk.com/en-gb/media/press-releases/statement-zantac-ranitidine-litigation/) (the "**First Zantac Press Release**"); and

(w) the press release dated 16th August, 2022 (which can be accessed at the following hyperlink: https://www.gsk.com/en-gb/media/press-releases/statement-zantac-ranitidine-us-litigation/) (the "**Second Zantac Press Release**", and together with the First Zantac Press Release, the "**Zantac Press Releases**"),

save that any statement contained in a document which is deemed to be incorporated by reference herein shall be deemed to be modified or superseded for the purpose of this Prospectus to the extent that a statement contained herein modifies or supersedes such earlier statement (whether expressly, by implication or otherwise). Any statement so modified or superseded shall not be deemed, except as so modified or superseded, to constitute a part of this Prospectus. Certain information contained in the documents listed above has not been incorporated by reference in this Prospectus. Such information is not relevant for prospective investors or is covered elsewhere in this Prospectus.

Following the publication of this Prospectus, a supplement may be prepared by the Issuers and the

olutions

Imagine if you could read the litigation complaints to gague severity?

Options | Settings | Export | Document Search & Analytics

Search: zantac
Securities/Lists: GSK LN Equity
Source: U.S. Litigation
Date: Last 2 Years

1 Synonyms | Filings | Industries | Annotations | Pages | More Filters » | Alert | Clear

Mentions

Last 24 Months

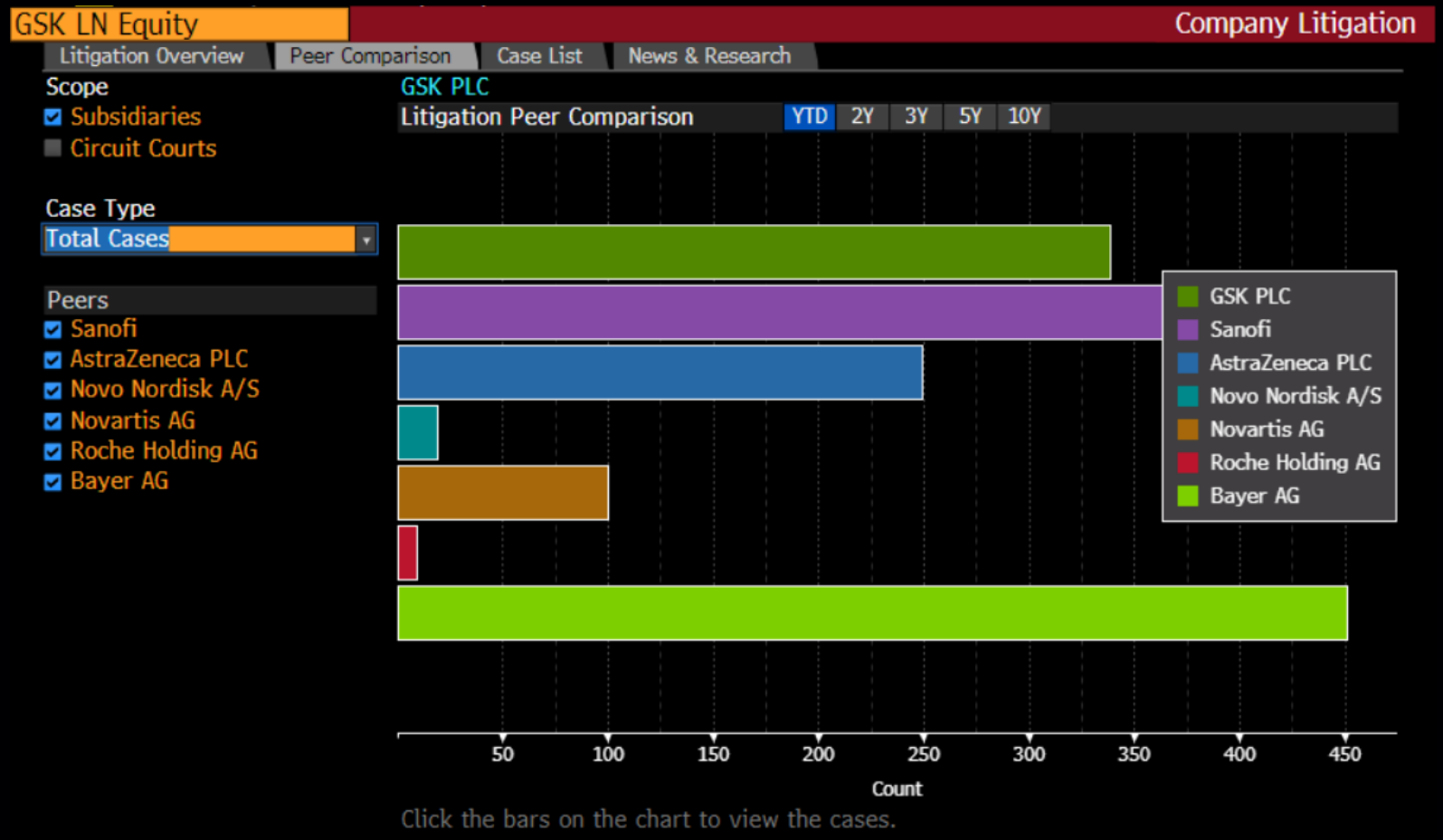
Securities | More »	Courts | More »	Litigation Types | »
GlaxoSmithKline LLC	U.S. District Court for t...	Personal Injury: Produ...
Pfizer Inc	U.S. District Court for t...	Personal Injury - Healt...
Boehringer Ingelheim P...	U.S. District Court for t...	Real Property: Tort Pro...
Sanofi US Services Inc	U.S. District Court for t...	Personal Injury - Healt...

Show Details

Documents	Matches	Type	Page	Date
Farrell v. GLAXOSMITHKLINE LLC; et al, Docket No. 9:22-cv-8		Federal Dockets		09/09/22
Gerrodette, et al v. GLAXOSMITHKLINE LLC, et al, Docket No. 9		Federal Dockets		09/09/22
Stevenson et al v. GLAXOSMITHKLINE LLC; et al, Docket No. 9		Federal Dockets		09/09/22
Diamond, et al v. GLAXOSMITHKLINE LLC, et al, Docket No. 9:2		Federal Dockets		09/09/22
Pugh et al v. GLAXOSMITHKLINE LLC; et al, Docket No. 9:22-c		Federal Dockets		09/09/22
Sanders v. GLAXOSMITHKLINE LLC; et al, Docket No. 9:22-cv-		Federal Dockets		09/09/22
Winfey v. GLAXOSMITHKLINE LLC; et al, Docket No. 9:22-cv-8		Federal Dockets		09/09/22
Vigus- Rainwater et al v. GLAXOSMITHKLINE LLC; et al, Docke		Federal Dockets		09/08/22
Bryant et al v. GLAXOSMITHKLINE LLC; et al, Docket No. 9:22-		Federal Dockets		09/08/22
Muncy v. GLAXOSMITHKLINE LLC; et al, Docket No. 9:22-cv-81		Federal Dockets		09/08/22
Adkins et al. v. GlaxoSmithKline, LLC et al, Docket No. 9:22-c		Federal Dockets		09/07/22
Ard et al v. GlaxoSmithKline, LLC et al, Docket No. 9:22-cv-8		Federal Dockets		09/07/22
Acevedo et al v. GlaxoSmithKline, LLC et al, Docket No. 9:22-		Federal Dockets		09/07/22
Brown et al v. GlaxoSmithKline LLC et al, Docket No. 9:22-cv		Federal Dockets		09/06/22
Hucks v. GLAXOSMITHKLINE LLC et al, Docket No. 9:22-cv-813		Federal Dockets		09/06/22
Allison et al v. GlaxoSmithKline, LLC et al, Docket No. 1:22-c		Federal Dockets		08/23/22

Bloomberg Buy-Side Solutions

CL <GO> GSK is about as litigious as Astra, Novo and Bayer



Summarising

Speakers

Umut Topkara, PhD

Head of AI Research & News
Bloomberg Engineering

Bloomberg AI: First Principles

Content

- Coverage, consistency, and timeliness across proprietary and premium content

Search

- Quickly and easily find what you want and leave out the rest

Analytics

- Read less and know more about topics, entities, sentiment and their trends

Insights

- Aggregate and distill into common or unique themes

Ease of use

- Natural, easy interaction and clear interface

AI Product Build Process:
Converting Unstructured Data into Structured Insights

Unstructured Data Sources

Speech
earnings calls, client calls, press conferences

Images
charts, tables

Text
news, research, social media, transcripts, websites, MSG, IB, search queries

AI Tasks

transcription
image segmentation
object detection
topic classification
named entity recognition
entity linking
event extraction
translation
sentiment analysis
importance ranking
summarization
clustering
relevance ranking
query understanding
autocomplete
anomaly detection
time series analysis
...

Bloomberg Products

- Research
- News
- Search
- Community
- Trading Systems
- BGOV
- Charts
- Enterprise

Bloomberg AI: Organization & Focus

MONITOR

I'm tracking what's happening

SEARCH

I know what I want, help me find it

DISCOVER

I'm looking for new ideas

ENRICHMENT

What is this document about? What companies, people, topics etc.. are relevant?

RANKING & UNDERSTANDING

What are the most relevant documents, themes, entities, and topics for this search and this user?

ANALYTICS

What topics & themes are important? How have they been trending over time? What is the sentiment?

CONTINUOUS MAINTENANCE

Deploy AI models, monitor their quality and improve performance

Bloomberg AI: Continuous Investment Drives Innovation

	2000s - early 2010s	Early 2010s - late 2010s	Late 2010s to Present
Model Types	Linear / Logistic Regression Support Vector Machines Hidden Markov Models	Feed-forward Neural Networks Convolutional Neural Networks Recurrent Neural Networks	Transformer-based Neural Networks
Model Sizes	1K ~ 10K parameters	100K ~ 10M parameters	100M ~ 100B parameters
Data	Exclusively use large amounts of supervised data	Supervised data supplemented by self-supervision using unlabeled corpora	Large amounts of unlabeled data, some supervised labels
Hardware	CPU	Mostly CPU, some GPU	GPU

How We Build AI Products : Secret Ingredients

High Quality Data

Diverse Sources, Exhaustive Knowledge Graph, Expert annotations

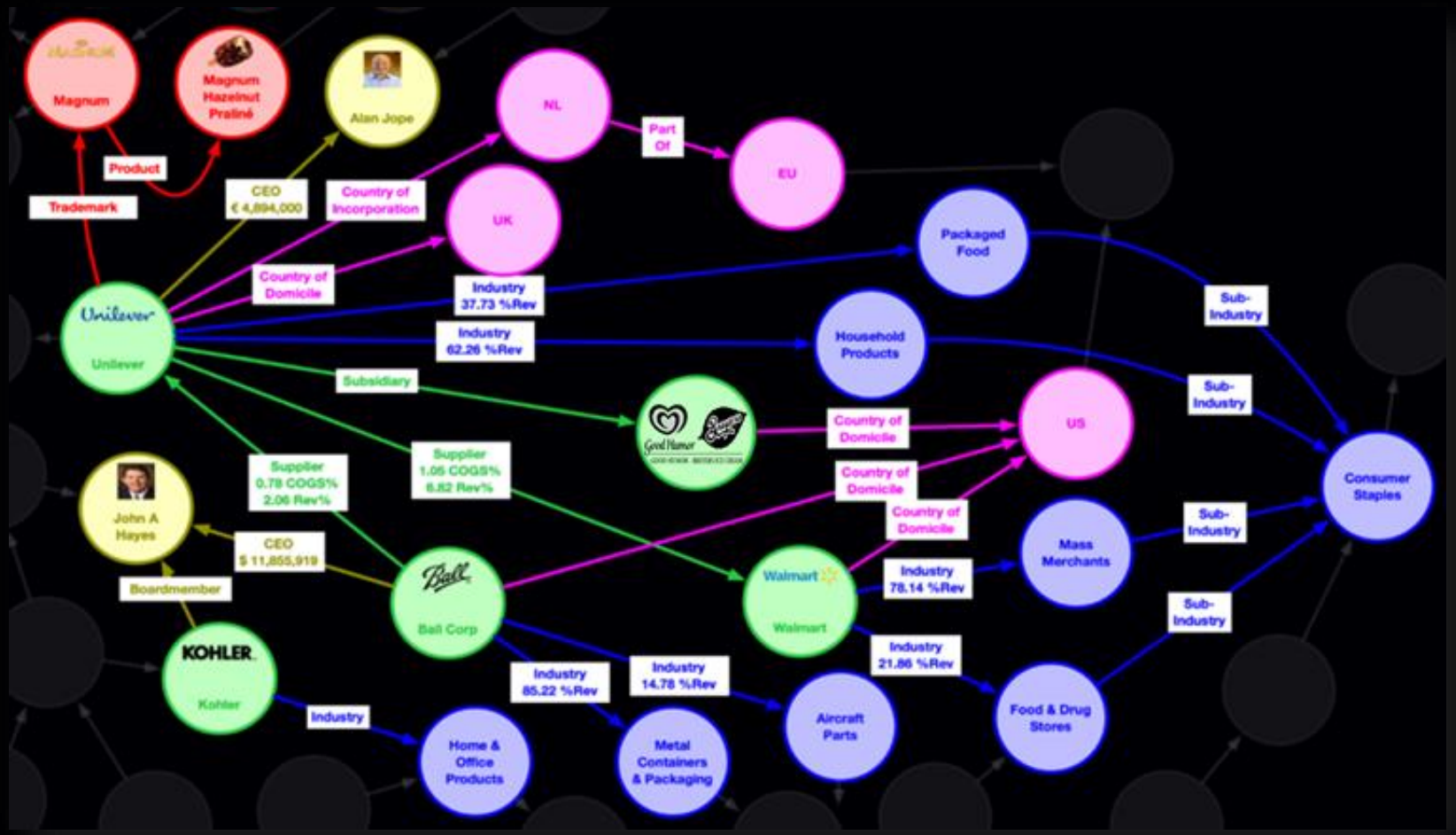
+

40 Years Experience Building Data Products

Complex Data Engineering Systems

Subject Matter Experts

How We Build AI Products: The Bloomberg Knowledge Graph



- Companies
- Industries
- People
- Geographical location
- Product, Brand, or trademark

How We Build AI Products: Model Development Lifecycle

SAMPLING

Documents (Research, News, Social, Transcripts, Filings, etc.) are sampled to effectively learn and evaluate the models.

ANNOTATION

Subject matter experts painstakingly annotate the sampled collection of documents for a target task.

KNOWLEDGE CURATION

Information about the universe of companies, people, industries, KPI are curated by Global Data, and organized into Knowledge Graph.

MODEL EXPLORATION & TRAINING

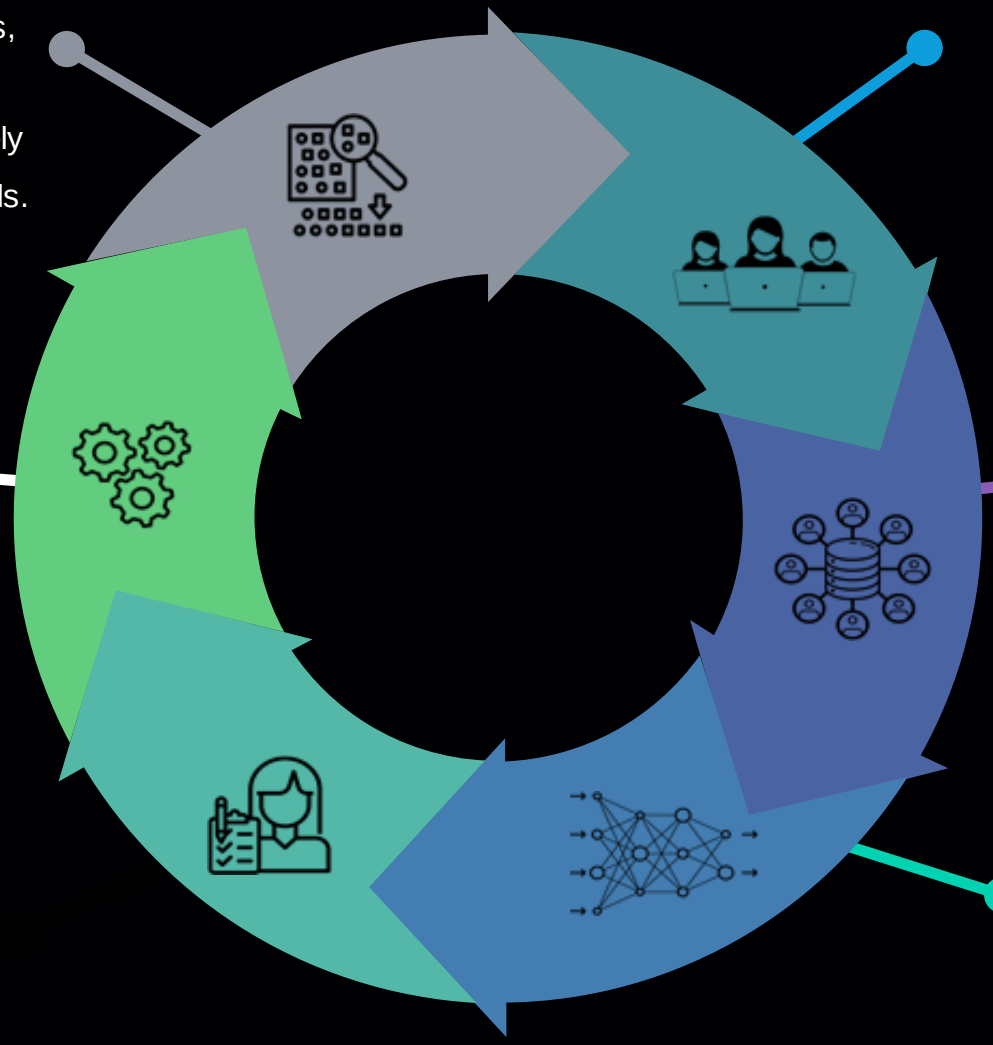
ML Engineers iterate on experimenting and improving various model approaches to match the required performance for effective product.

EVALUATION & QC

Subject matter experts inspect the model output qualitatively. Automated evaluation on holdout data is checked to ensure overall performance level.

PRODUCTION

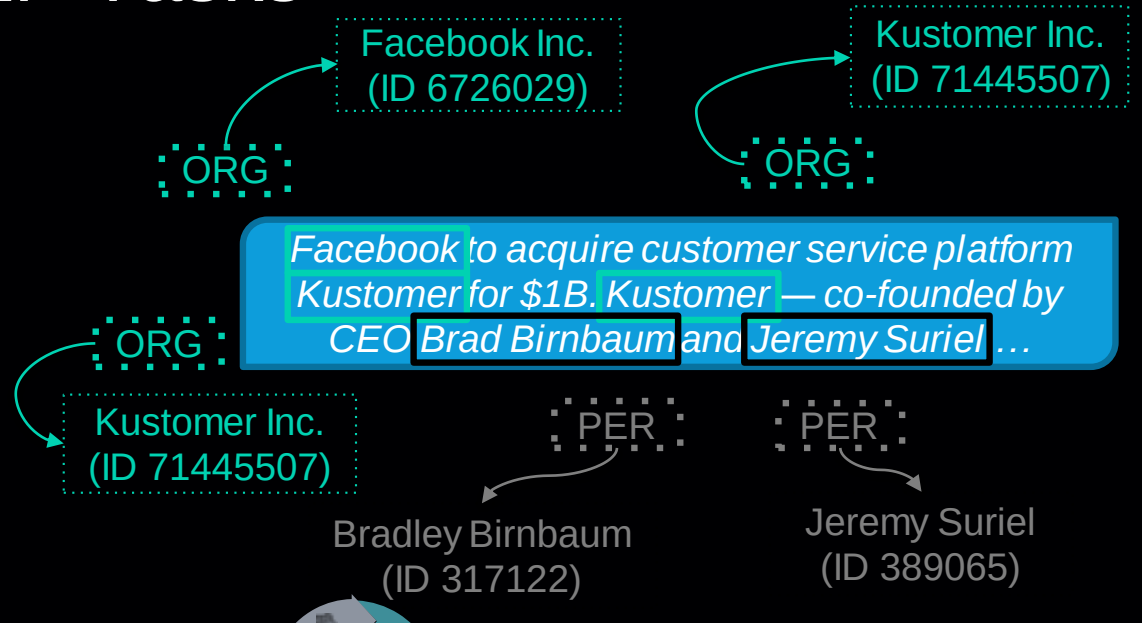
Model is deployed to production service part of the data infrastructure to process live data. The output feeds client facing product.



How We Build AI Products: Core NLP Tasks

Typically organized as pipelines

Models in each step can be developed, tuned and maintained separately



Topic Classification

Named Entity Recognition

Entity Linking

Attribute Lookup

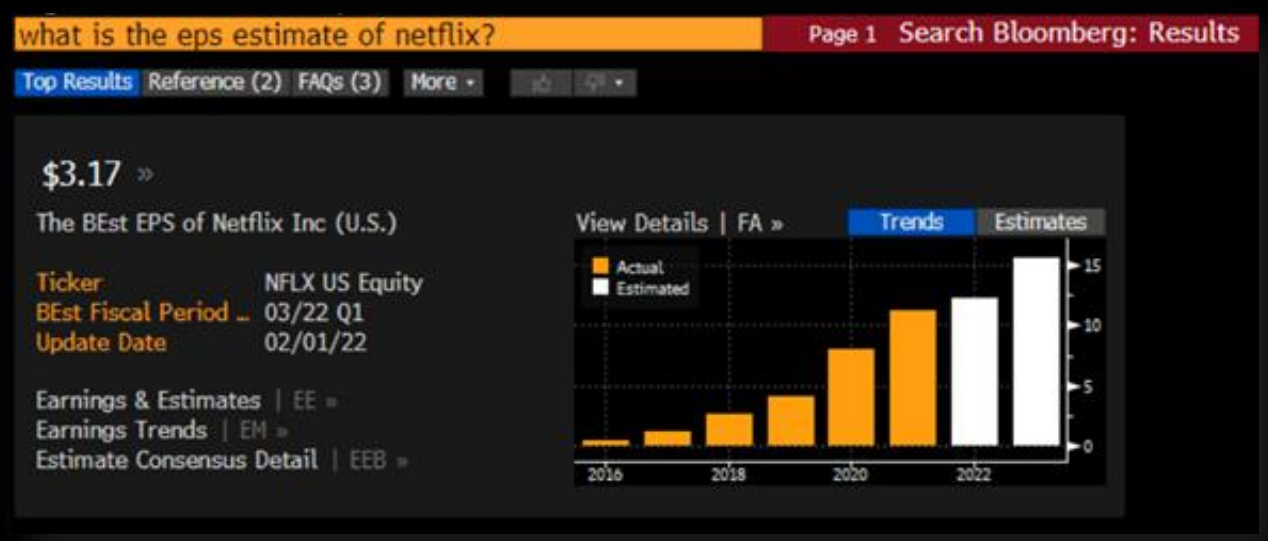
Additional Strategic Investments in NLP: News Themes NSTM<GO>

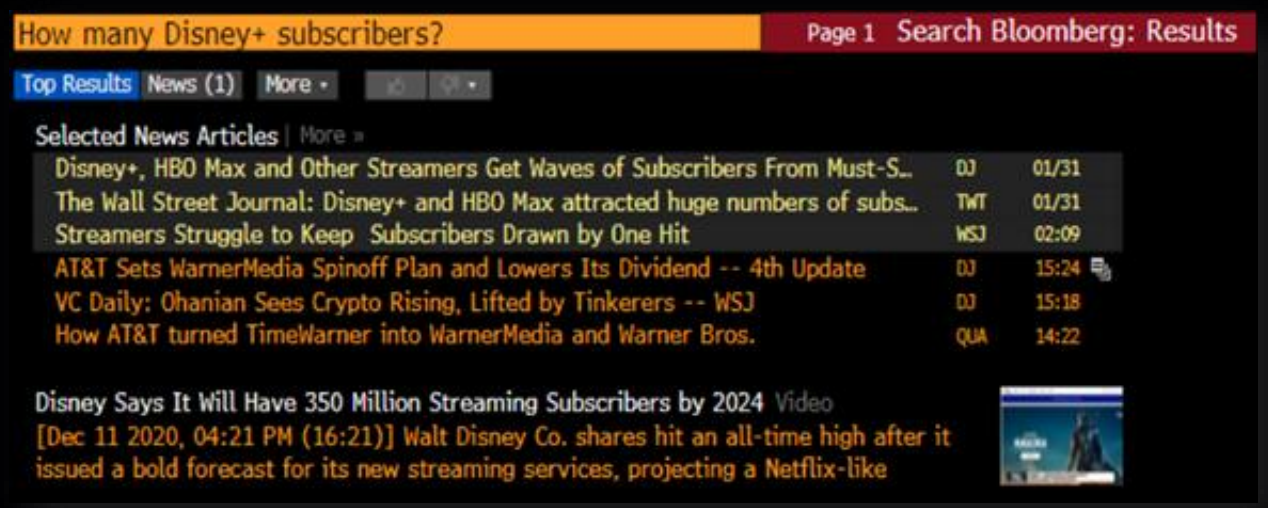
NLP Tasks Required

- Named Entity Recognition
- Entity Linking
- Document / Topic / Genre Classification
- Entity Salience
- Abstractive / Extractive Summarization
- Relation Extraction
- Relevance Ranking

Additional Strategic Investments in NLP: Bloomberg Search

Query understanding and question answering is key in when it comes to discovery of content





Bloomberg AI: Relevancy and Recommended Content

Options ▾ | Settings | Export ▾ | Document Search & Analytics

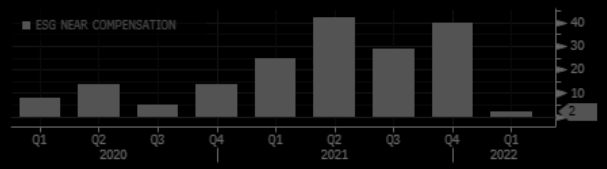
Search: esg compensation | Securities/Lists | Source: Transcripts | Date: All Dates ▾

27 Synonyms ▾ | Industries ▾ | Annotations ▾ | More Filters »

Trends | More Trends »

Last 24 Months

Topic | More »	Transcript Remarks | »	Securities | More »
Corporate Governance	Prepared Remarks	Algonquin Power & Util...
Environment (ESG)	Mgmt Answers	Ameren Corp
Executive Compensation	Analyst Questions	Knorr-Bremse AG
Climate Change		General Motors Co



Show Details

Documents	Securities	Matches	Type	Time
Bureau Veritas SA: Investor Day	BVI FP Equity	1	Shareholder Mtg ...	12/03/21
CNH Industrial NV: Iveco Group Investor Day	CNHI US Equity	1	Shareholder Mtg ...	11/18/21
JetBlue Airways Corp: Q3 2021 Earnings Call	JBLU US Equity	1	Earnings Call	10/26/21
Mettler-Toledo International Inc: J.P. Morgan 40th Annual Healt...	MTD US Equity	1	Conf Presentatio...	01/11/22
Avantor Inc: J.P. Morgan 40th Annual Healthcare Conference 20...	AVTR US Equity	1	Conf Presentatio...	01/10/22
Wacker Chemie AG: Capital Markets Day	WCH GR Equity	1	Shareholder Mtg ...	12/16/21
AltaGas Ltd: Investor Day	ALA CN Equity	1	Shareholder Mtg ...	12/15/21
Laurentian Bank of Canada: Investor Day	LB CN Equity	2	Shareholder Mtg ...	12/10/21
Tyson Foods Inc: Investor Day	TSN US Equity	1	Shareholder Mtg ...	12/09/21
Reinsurance Group of America Inc: Investor Day	RGA US Equity	1	Shareholder Mtg ...	12/09/21
Cenovus Energy Inc: Investor Day	CVE CN Equity	1	Shareholder Mtg ...	12/08/21
Pembina Pipeline Corp: Business Update Call	PPL CN Equity	2	M&A Call	12/08/21
Enbridge Inc: 2021 Enbridge Day: Investment Community Confe...	ENB CN Equity	1	Conf Presentatio...	12/07/21
Fellow Finance Oyj: 2021 Enbridge Day: Investment Community ...	FELLOW FH Equity	1	M&A Call	12/07/21
Anheuser-Busch InBev SA/NV: Investor Seminar	ABI BB Equity	1	Conf Presentatio...	12/06/21
Wendel SE: Investor Day	MF FP Equity	3	Shareholder Mtg ...	12/02/21
Solvay SA: ESG Webinar	SOLB BB Equity	1	Conf Presentatio...	12/01/21
W&T Offshore Inc: Bank of America Leveraged Finance Virtual C...	WTI US Equity	1	Conf Presentatio...	12/01/21
Bystronic AG: Capital Markets Day	BYS CH Equity	2	Shareholder Mtg ...	11/30/21

Historical engagement data

The intensity of the discussion and

Other proprietary sources to recommend the best results

Looking Forward

Continued Investment Ensuring Best In Class Search Platform

- Query Understanding & Expansion
- Relevance Ranked Results
- Brand & Entity Detection

Answering Questions

- Extracting Key Info from Documents

Identifying the Themes Driving Performance

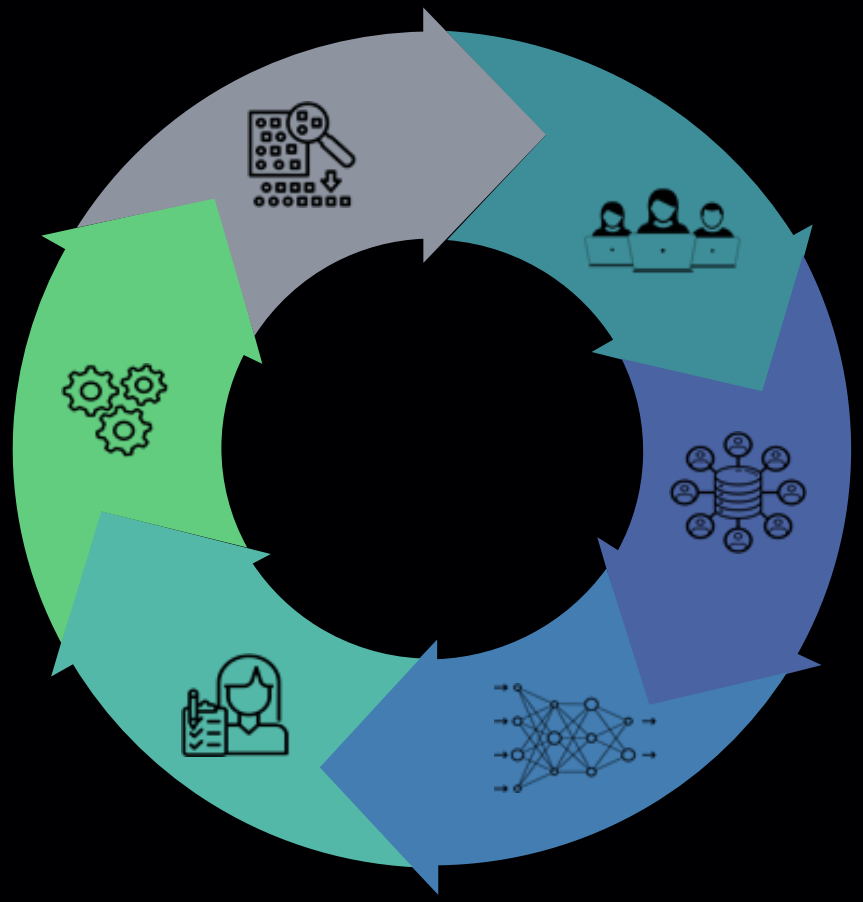
Sentiment In Earnings Calls

- Identify Inflection Points in Key Topic Areas

Key topic mentions quarter over quarter for United Airlines, mentions and sentiment colouring

Topic	Q2 2019	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021
Capital Expenditures	5	2	18	19	7	5	6	3
Guidance	2	29	23					8
M&A	2					3		
Labor Costs		3	5	8	11	3	1	5
Margins	9	6	4	2	1	2	9	12
Competition	3		2	1				6
China	5		5			1		1
Leverage			5	3		3	1	6
Recession	2		4	2	1	2	2	4
Headwinds	9		5					2
Inflation	2	1	1	1			5	5
COVID-19					4	2	5	2
Business Travel Costs			3		1			
EBITDA			1				10	13
Buybacks	2	1	2	1			1	
Inventory								1
Transportation Costs								
Interest Rates								1
Dividends								
Backlog			1					
Supply Chain							1	1
Return-to-Office/Work-from-Ho					1			1
Consumer Spending								1
Environment (ESG)								
Consumer Confidence	1							1
Organic Growth								

Bloomberg AI and Research



Speakers

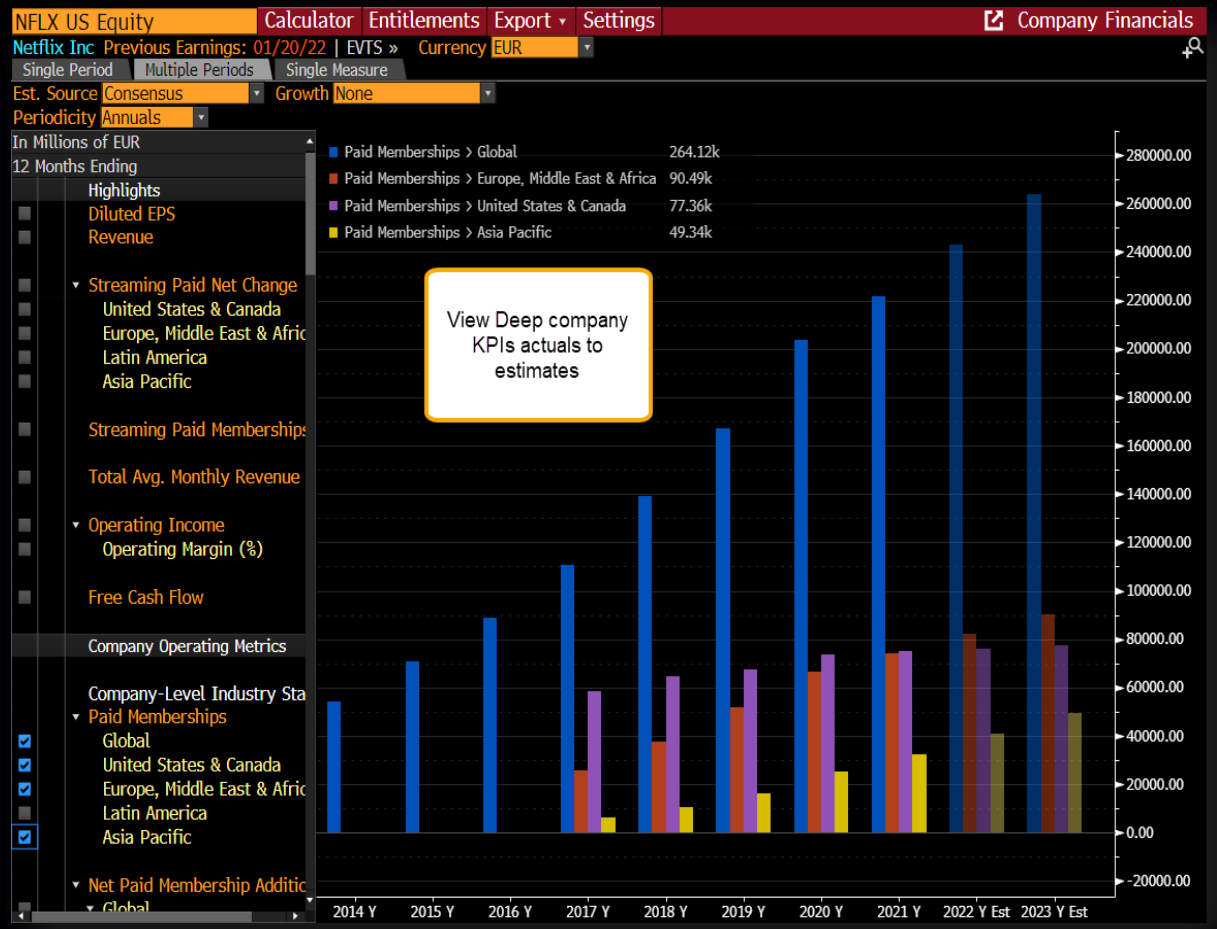
Mat Connorton

Application Specialist

Integrating Document Search, Earnings Season, and MODL <GO>

Valuation: Netflix (NFLX US) Case Study

NFLX US Case Study:
Using MODL <GO> + DS <GO>



NFLX US Case Study:
Using MODL <GO> + DS <GO>

NFLX US Equity | Calculator | Entitlements | Export | Settings

Netflix Inc Previous Earnings: 01/20/22 | EVTS » Currency EUR

Single Period | Multiple Periods | Single Measure

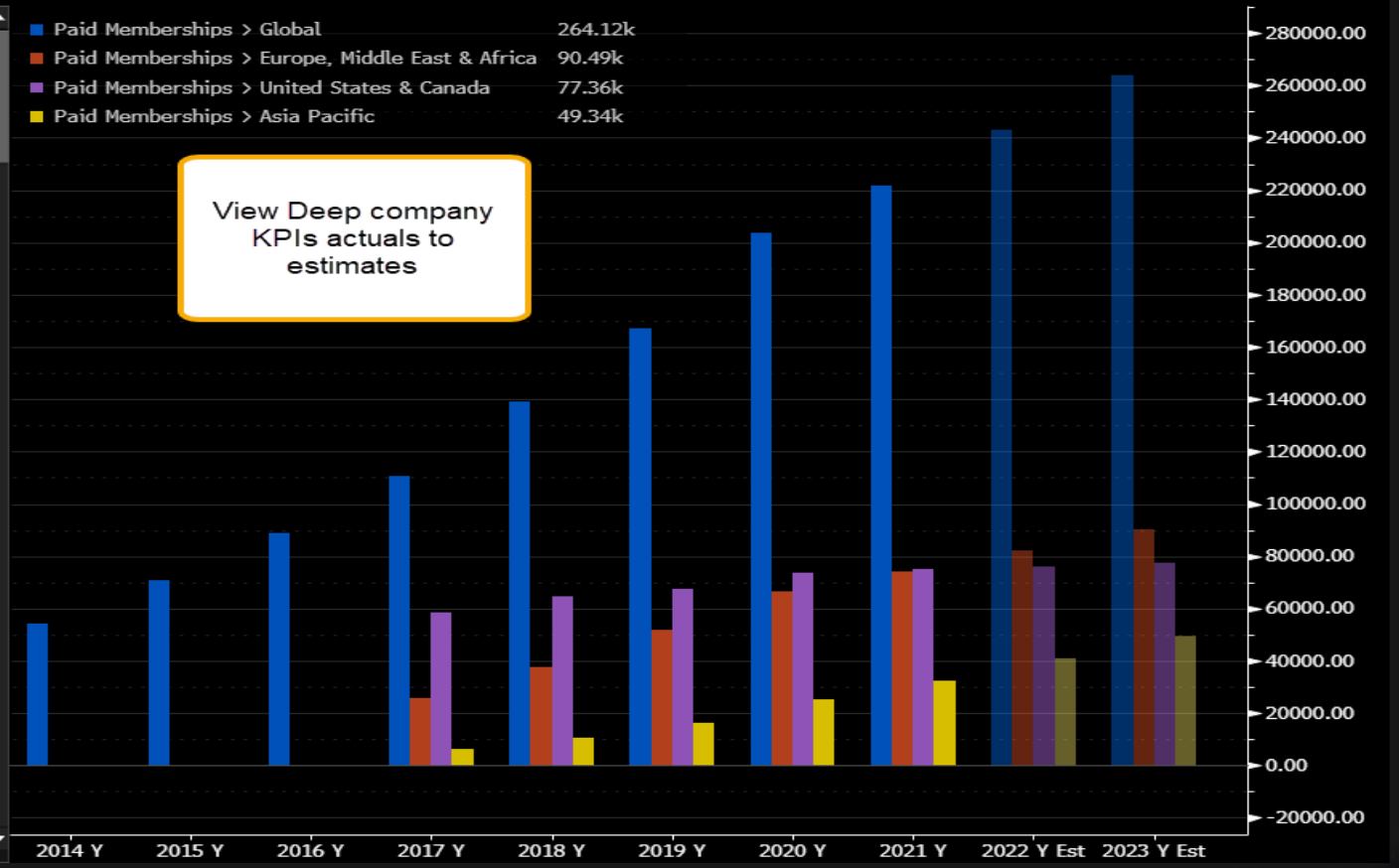
Est. Source Consensus Growth None

Periodicity Annuals

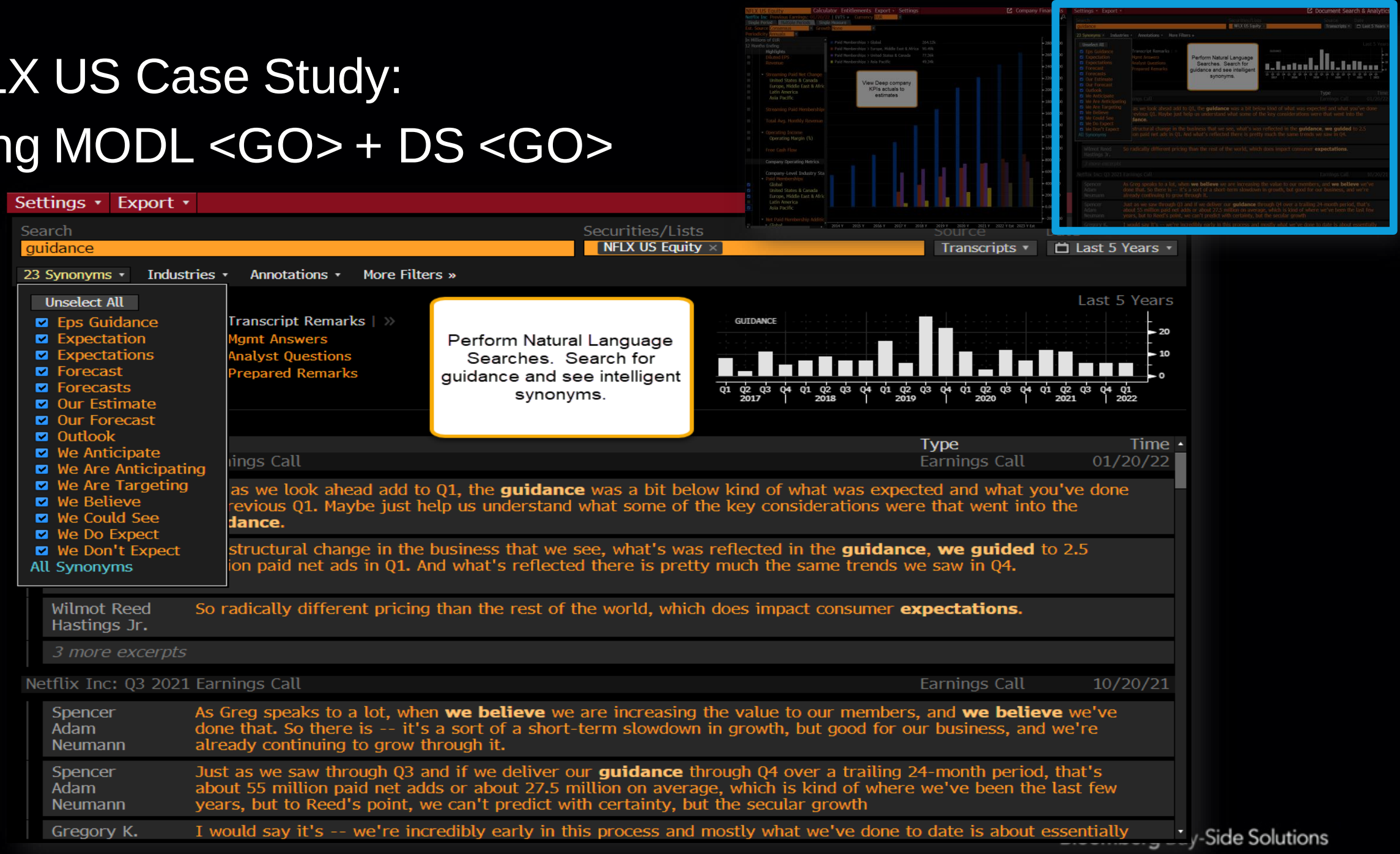
In Millions of EUR

12 Months Ending

- Highlights
  - Diluted EPS
  - Revenue
- Streaming Paid Net Change
  - United States & Canada
  - Europe, Middle East & Afric
  - Latin America
  - Asia Pacific
- Streaming Paid Memberships
- Total Avg. Monthly Revenue
- Operating Income
  - Operating Margin (%)
- Free Cash Flow
- Company Operating Metrics
- Company-Level Industry Sta
- Paid Memberships
  - Global
  - United States & Canada
  - Europe, Middle East & Afric
  - Latin America
  - Asia Pacific
- Net Paid Membership Additic
  - Global



NFLX US Case Study:
Using MODL <GO> + DS <GO>



NFLX: Using MODL <GO> 4Q21 Earnings Results Analysis

NFLX US Equity | Calculator | Entitlements | Export | Settings | Company Financials

Netflix Inc Earnings: 01/20/22 | EVTS » Processing Financials | DSCO » Currency USD

Single Period | Multiple Periods | Single Measure

Period 2021 - Quarter 4 Compare Actuals vs. Estimates (Sort Detail

Metric	Actuals	Consensus			Low	Distribution	High	Guidance
Analyst								
Analyst Recommendation								
Model Download								
Table Data Date	01/20/2022	01/19/2022						10/19/2021
Highlights								
Diluted EPS	1.33	0.81	33	64.51%	0.59		1.04	0.80
Revenue	7,709.32	7,711.72	36	-0.03%	7,621.00		7,798.00	7,712.00
Streaming Paid Net Change	8,281.00	8,134.01	19	1.81%	6,252.47		8,901.67	
United States & Canada	1,191.00	596.84	18	99.55%	115.18		1,342.66	
Europe, Middle East & Africa	3,536.00	3,452.60	17	2.42%	2,250.00		4,300.00	
Latin America	973.00	1,227.33	19	-20.72%	610.50		2,000.00	
Asia Pacific	2,581.00	2,914.54	18	-11.44%	1,879.37		4,223.62	
Streaming Paid Memberships	221,844.00	221,649.85	19	0.09%	219,815.47		222,464.67	
Total Avg. Monthly Revenue pe...	11.67	11.74	18	-0.58%				
Operating Income	631.77	559.00	34	13.02%				
Operating Margin (%)	8.19	6.96	20	17.81%				
Free Cash Flow	-569.25	-516.84	14	-10.14%				
Company Operating Metrics								
Company-Level Industry Statis...								
Paid Memberships								
Global	221,844.00	221,649.85	19	0.09%	219,815.47		222,464.67	
United States & Canada	75,215.00	74,606.58	19	0.82%	74,139.18		75,366.66	
Europe, Middle East & Africa	74,036.00	73,899.69	19	0.18%	72,750.00		74,804.00	
Latin America	39,961.00	40,214.91	19	-0.63%	39,598.50		40,988.00	
Asia Pacific	32,632.00	32,932.15	18	-0.91%	31,930.37		34,274.62	

Paid membership increases were mixed, with Netflix outperforming expectations in its more-penetrated markets but falling short in Latin America and Asia.

NFLX: Using MODL <GO> 4Q21 Earnings Results Analysis

NFLX US Equity | Calculator | Entitlements | Export | Settings | Company Financials

Netflix Inc Earnings: 01/20/22 | EVTS » Processing Financials | DSCO » Currency USD

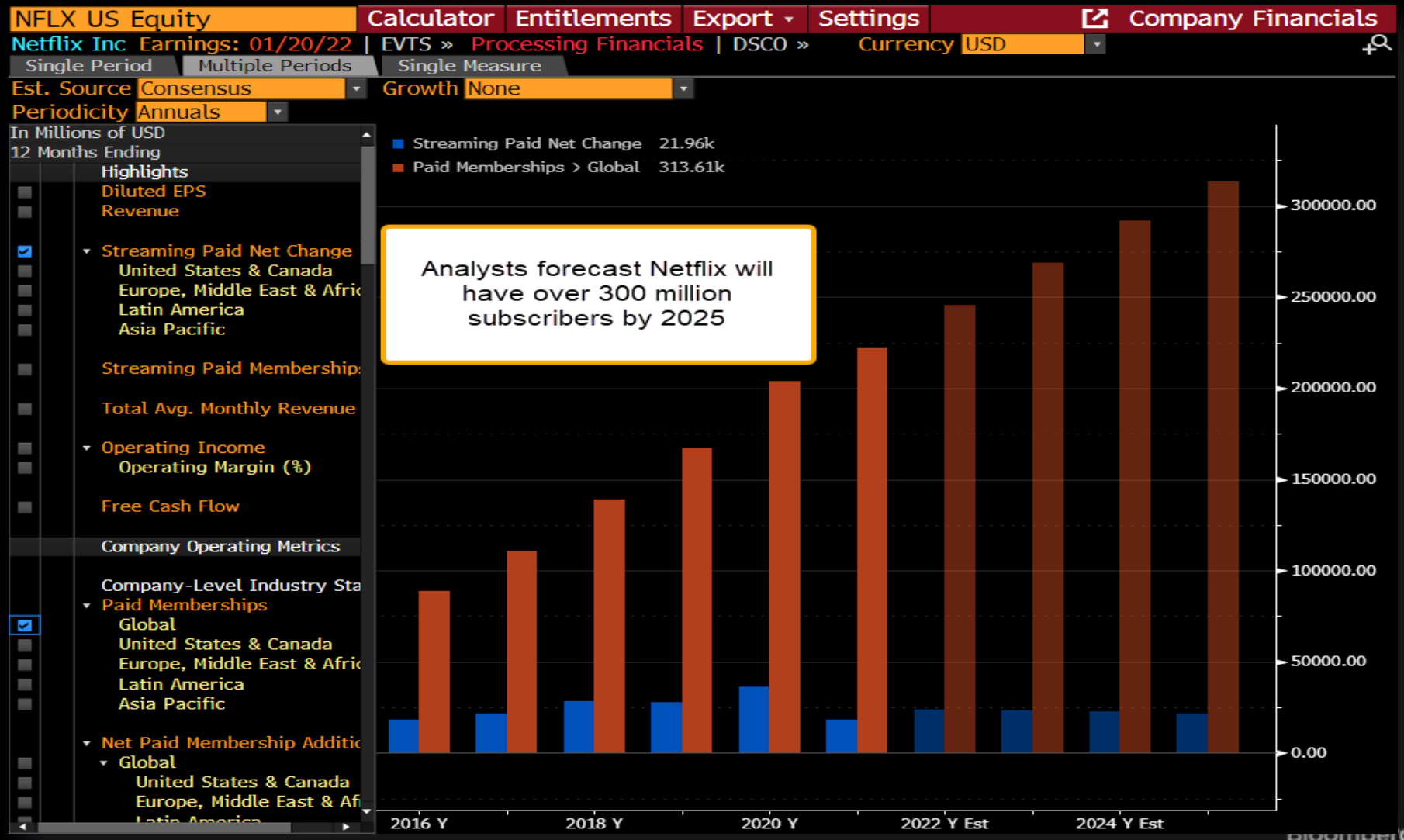
Single Period | Multiple Periods | Single Measure

Period 2021 - Quarter 4 | Compare Actuals vs. Estimates (| Sort Detail

Metric	Actuals	Consensus			Low	Distribution	High	Guidance
Analyst								
Analyst Recommendation								
Model Download								
Table Data Date	01/20/2022	01/19/2022						10/19/2021
Highlights								
Diluted EPS	1.33	0.81	33	64.51%	0.59		1.04	0.80
Revenue	7,709.32	7,711.72	36	-0.03%	7,621.00		7,798.00	7,712.00
Streaming Paid Net Change	8,281.00	8,134.01	19	1.81%	6,252.47		8,901.67	
United States & Canada	1,191.00	596.84	18	99.55%	115.18		1,342.66	
Europe, Middle East & Africa	3,536.00	3,452.60	17	2.42%	2,250.00		4,300.00	
Latin America	973.00	1,227.33	19	-20.72%	610.50		2,000.00	
Asia Pacific	2,581.00	2,914.54	18	-11.44%	1,879.37		4,223.62	
Operating Income	631.77	559.00	34	13.02%				
Operating Margin (%)	8.19	6.96	20	17.81%				
Free Cash Flow	-569.25	-516.84	14	-10.14%				
Company Operating Metrics								
Company-Level Industry Statis...								
Paid Memberships								
Global	221,844.00	221,649.85	19	0.09%	219,815.47		222,464.67	
United States & Canada	75,215.00	74,606.58	19	0.82%	74,139.18		75,366.66	
Europe, Middle East & Africa	74,036.00	73,899.69	19	0.18%	72,750.00		74,804.00	
Latin America	39,961.00	40,214.91	19	-0.63%	39,598.50		40,988.00	
Asia Pacific	32,632.00	32,932.15	18	-0.91%	31,930.37		34,274.62	

Paid membership increases were mixed, with Netflix outperforming expectations in its more-penetrated markets but falling short in Latin America and Asia.

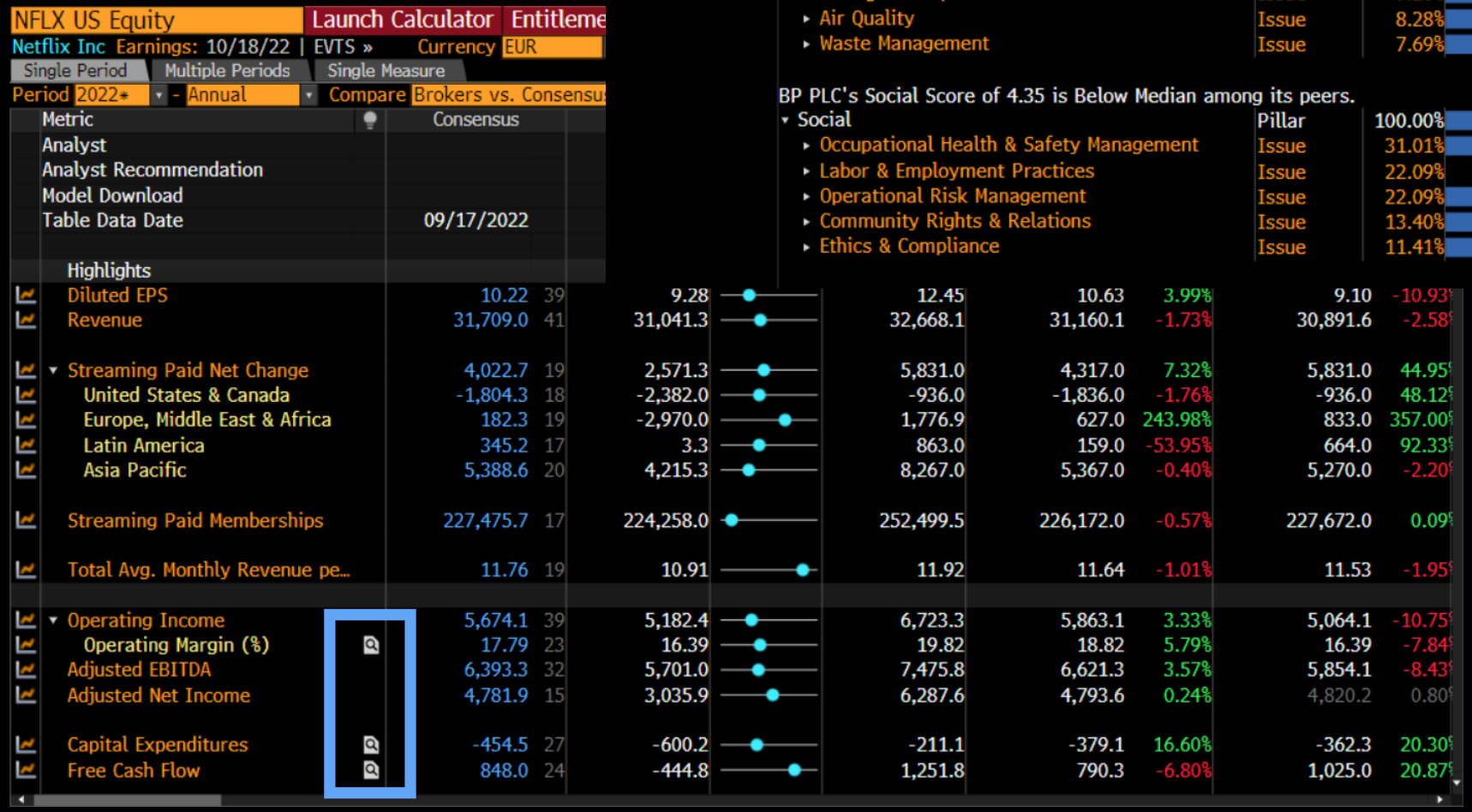
NFLX: Using MODL <GO> To Visualising Key Metric Trends



Bloomberg Buy-Side Solutions

DS Icons

BP/ LN Equity
Methodology
ESG Controversies News
ESG Analysis
Overview
BBG ESG Scores
EU Taxonomy
Temperature Rise
Fiscal Year 2021
Peers Integrated Oils | CCB BECS »
Materiality Framework
Metric
Score Level
Weight
Score
Upper Target
Vs Peers
BP PLC's Environmental Score of 4.9 is Above Median among its peers.
Environmental Pillar 100.00% 4.90 Above Median
Climate Exposure Issue 25.18% 6.07 7.95 Below Median
GHG Emissions Management Issue 25.18% 5.83 7.72 Leading
Water Management Issue 13.54% 5.39 8.72 Leading
Energy Management Issue 10.88% 0.00 3.00 Lagging
Ecological Impact Issue 9.26% 3.80 7.23 Below Median
Air Quality Issue 8.28% 7.23 7.43 Above Median
Waste Management Issue 7.69% 6.47 10.00 Leading
BP PLC's Social Score of 4.35 is Below Median among its peers.
Social Pillar 100.00% 4.35 Below Median
Occupational Health & Safety Management Issue 31.01% 7.38 9.32 Leading
Labor & Employment Practices Issue 22.09% 0.00 3.00 Lagging
Operational Risk Management Issue 22.09% 7.17 10.00 Above Median
Community Rights & Relations Issue 13.40% 3.00 3.00 Above Median
Ethics & Compliance Issue 11.41% 5.73 7.04 Leading


NFLX US Equity
Launch Calculator
Entitleme
Netflix Inc Earnings: 10/18/22 | EVTS »
Currency EUR
Single Period
Multiple Periods
Single Measure
Period 2022* - Annual
Compare Brokers vs. Consensus
Metric
Consensus
Analyst
Analyst Recommendation
Model Download
Table Data Date 09/17/2022
Highlights
Diluted EPS 10.22 39 9.28 12.45 10.63 3.99% 9.10 -10.93
Revenue 31,709.0 41 31,041.3 32,668.1 31,160.1 -1.73% 30,891.6 -2.58
Streaming Paid Net Change 4,022.7 19 2,571.3 5,831.0 4,317.0 7.32% 5,831.0 44.95
United States & Canada -1,804.3 18 -2,382.0 -936.0 -1,836.0 -1.76% -936.0 48.12
Europe, Middle East & Africa 182.3 19 -2,970.0 1,776.9 627.0 243.98% 833.0 357.00
Latin America 345.2 17 3.3 863.0 159.0 -53.95% 664.0 92.33
Asia Pacific 5,388.6 20 4,215.3 8,267.0 5,367.0 -0.40% 5,270.0 -2.20
Streaming Paid Memberships 227,475.7 17 224,258.0 252,499.5 226,172.0 -0.57% 227,672.0 0.09
Total Avg. Monthly Revenue pe... 11.76 19 10.91 11.92 11.64 -1.01% 11.53 -1.95
Operating Income 5,674.1 39 5,182.4 6,723.3 5,863.1 3.33% 5,064.1 -10.75
Operating Margin (%) 17.79 23 16.39 19.82 18.82 5.79% 16.39 -7.84
Adjusted EBITDA 6,393.3 32 5,701.0 7,475.8 6,621.3 3.57% 5,854.1 -8.43
Adjusted Net Income 4,781.9 15 3,035.9 6,287.6 4,793.6 0.24% 4,820.2 0.80
Capital Expenditures -454.5 27 -600.2 -211.1 -379.1 16.60% -362.3 20.30
Free Cash Flow 848.0 24 -444.8 1,251.8 790.3 -6.80% 1,025.0 20.87

Document Search Webinar Link:
https://www.bloomberg.com/professional/blog/webinar/ai-search-machine-learning-powered-research-webinar/?sref=bTZL5BiF

AI Document Search Blog:
https://www.bloomberg.com/professional/blog/5-ways-ai-is-shaping-the-future-of-investment-research-2/

Document Search Product Overview:
https://assets.bbhub.io/professional/sites/10/Document-Search-Overview-doc_V3.pdf