



| Company Insights on Intelligize®

Re-imagine Company Research

YOUR CHALLENGE

To stay competitive, you need to a complete picture. You need a wide range of financial information and company intelligence, so you can track your competitors and the latest industry trends. With seemingly endless sources of information, how do you separate the key signals from the noise?

Disclosure provides a rich and highly reliable source of competitor intelligence around recent performance, financials and the company's perspective on the competitive environment, risk factors, and how they are managing the impact of regulatory changes/updates. But you also need to review earnings calls commentary and Q&A for insight into a company's strategy and outlook.



"Intelligize is both intuitive and expansive, making it easy to find that one precedent you know is out there, or to identify the risk factor that is missing from an issuer's disclosure document. Other platforms we tried seemed to require on-going training or constant use in order to be utilized efficiently. Intelligize was clearly designed with the practitioner in mind."

**Senior Vice President
Fortune 500 Banking Company**

Couple that with press releases, news, company presentations (investor/analyst reports and trade journals, and your review process can quickly become disjointed and overwhelming.

How do you link together all the relevant information to build a complete picture of your competitors, peers, and the market as a whole?

OUR SOLUTION

The *Company Insights* application on Intelligize delivers everything you need in one place by connecting the industry's most comprehensive collection of global securities filings, regulatory materials, and financial market data. We then overlay this content with our proprietary search capabilities — leveraging advanced algorithms and deep industry expertise enabling you to search and navigate all the extensive content sources to uncover the most relevant topics, trends and insights with speed and precision.

With our innovative technology and research expertise, Intelligize offers seamless access to:

- News
- Transcripts
- Presentations
- Stock Prices
- Financial data
- Ownership
- Corporate event calendars
- Estimates
- Analyst Reports
- SEC Filings
- Corporate Governance materials
- M&A/Deal trends

We arm you with rapid insights and solutions to respond to business challenges along with all the connected content needed to support your market research, competitive intelligence, and investor relations workflows.

PROFESSIONALS WE SERVE

- C-Suite
- Chief Accountant/Controller
- Chief Compliance Officer
- Competitive Intelligence Professional
- Corporate Secretary
- Filings Manager
- General Counsel
- Investor Relations
- Research Professional

WHY INTELLIGIZE?

Streamline Your Workflow

In a rapidly evolving marketplace, Intelligize supports your market research, competitive intelligence, and investor relations workflows so you can build a more complete picture of your competitors and peers and make more strategic and confident decisions faster.

- Access a wide range of connected information, to build deeper intelligence on your competitors via a single interface, customized for you on a single screen
 - Seamlessly navigate across different sources and documents for one or more competitors
 - Streamline your ability to rapidly monitor peers and segments through a customizable homepage
 - Compare information for up to 10 companies across the application
 - Save multiple peer groups and effortlessly switch between them
 - Analytics provide both high-level overviews and the ability to drill down into the data
 - Create alerts across multiple content sets to get automatically notified of important news, activities, and events
 - Benchmark your competitors — from financials and ratios through to disclosure language
 - Access earnings calls and other event transcripts, investor presentation decks, earnings release dates,
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analyst reports, SEC filings, and comment letters to help build color and insights around the numbers for competitors

- Stay ahead of negative stories with negative news search and be aware of stories with the potential to impact your company
- Collaborate with colleagues via notepad and shared notes functionality

Access a wide range of connected information, to build deeper, actionable intelligence.

Intelligize offers a wide range of company related information via a single interface, indexed and connected. The *Company Insights* content set includes:

- **News** – financial news, industry, macroeconomic, geopolitical trends, and developments (ESG), major headlines, negative news and press releases
- **Transcripts** – transcripts for companies' Earnings Calls, Analyst/Shareholder Meetings, Special Meetings, Conferences, Guidance, Sales/Revenue Meetings
- **Presentations** – earnings presentations, strategy, conference and special events (analyst/investor day) presentations, annual reports and shareholder letters
- **Stock price** – stock price data, performance, ratios, with the ability to overlay key events and news
- **Financial data** – Fundamental data, income statement, balance sheet, statement of cash flows
- **Ownership** – stock ownership information for major companies, by major institutions and individuals
- **Individuals** – contact information for analysts and fund managers (where available)
- **Calendar** – past and upcoming financial events, such as earning releases and investor days Estimates – sell-side analyst (consensus) estimates for future financial performance
- **Analyst reports** – 10 year rolling file of equity research reports provided by FactSet from more than 1,500 active contributors
- **SEC filings** – all major filings from public companies, including 10-K, 10- Q, 8-K, S-1 and information parsed from them (such as officers, insiders, accountant fees)
- **Corporate governance materials** – articles, bylaws, guidelines, board matters, committee charters and policies
- **Mergers & acquisitions** – deal activities with detailed Deal Points
- **Up-to-date and accurate information** – company financials, ratios, estimates, etc., are provided by leading market data vendor FactSet

LEARN MORE

Discover the many benefits of the Accounting Standards & Guidance application on Intelligize with a free trial. Start yours today at: LexisNexis.ca/Try-Intelligize

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