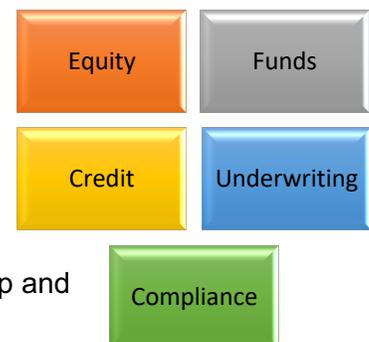

***Financial Services & Investment:
Enriching the Landscape on
Corporate and Securities Research.***

The 2020 challenge: COVID-19 turned the world upside down with quarantines, working remotely, plunging profits, market volatility, increasing refinancing and reorganizations, a growing demand for credit extensions by customers, and your shrinking budget. All these factors and more create a challenge to provide comprehensive support for financial service companies, where powerful, yet affordable applications support more than one team.

The real questions are: “How can I best equip equity research and analysts, fund managers with comprehensive fund research, credit research for corporate loans and refinancing, underwriting on debt offerings or research on Comment Letters and disclosure language for the compliance team? What can support all those critical functions without information overlap and duplication in costs as well?”



The real answer? Kaleidoscope. We help individual investors, investment management teams and investment banking companies conserve budget dollars and yet provide a flexible, easy to use cloud-based research platform that supports credit, equity and funds research, transactional, and compliance functions.



Here are just a few ways Kaleidoscope supports the financial services industry:

- **Robust search** on current or potential investments, i.e. corporate actions, financials, and transcripts.
- Analyze the terms of a spin-off, tender offer, offering circular, refinancing, or a merger
- **Peer Group** research identifying trends for manage portfolios and identify new opportunities
- **Portfolio Managers** can focus research and alerts on funds by using keywords, phrases, Series Ticker, Series ID or Contract ID and receive only the filings that contain the desired Contract ID.
- **Real-Time Alerts** on changes in funds and companies, or executive management moves.
- **Easily download all tables** with annual and quarterly into Excel.

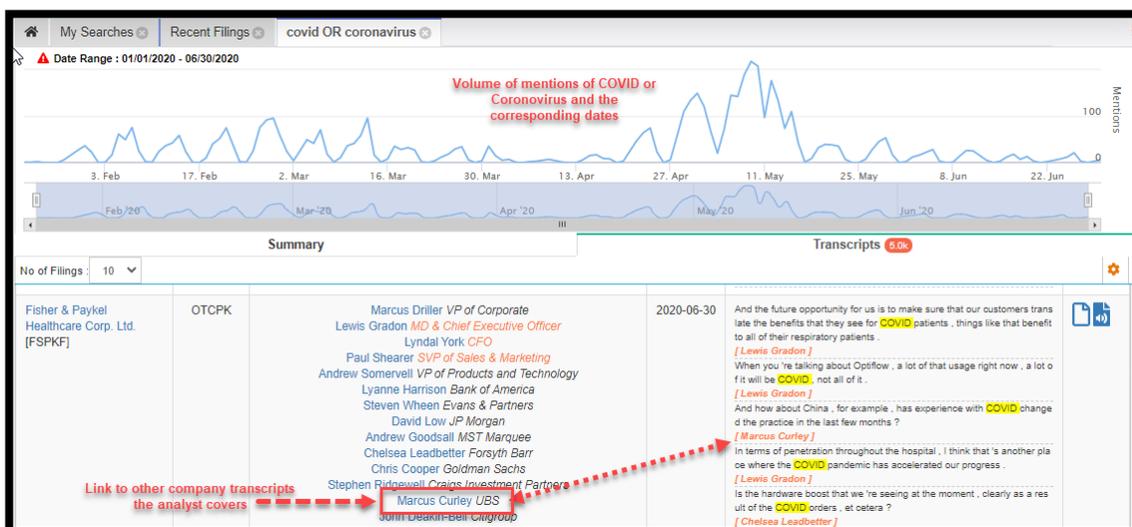
- **Monitor FINRA or SEC news**, enforcement actions, litigation, new rules, and compliance standards.
- **Share “Live” Reports** for up-to-the minute financial picture via customizable dashboards.
- Easy access to company **credit and underwriting agreements**.
- **Monitor changes** in control, sector trends, institutional holdings and activist investors.
- Stay abreast of **analyst’s opinions** with quick access to investor and industry news.
- **Discover** ESG and management’s effect on stock prices.

Added-Value Content:

End of Day Stock Prices – Enriched with an interactive overlay of filings by date. Download complete EOD history. See the effects of all disclosures, 8-K announcements, insider transactions or proxy voting results.

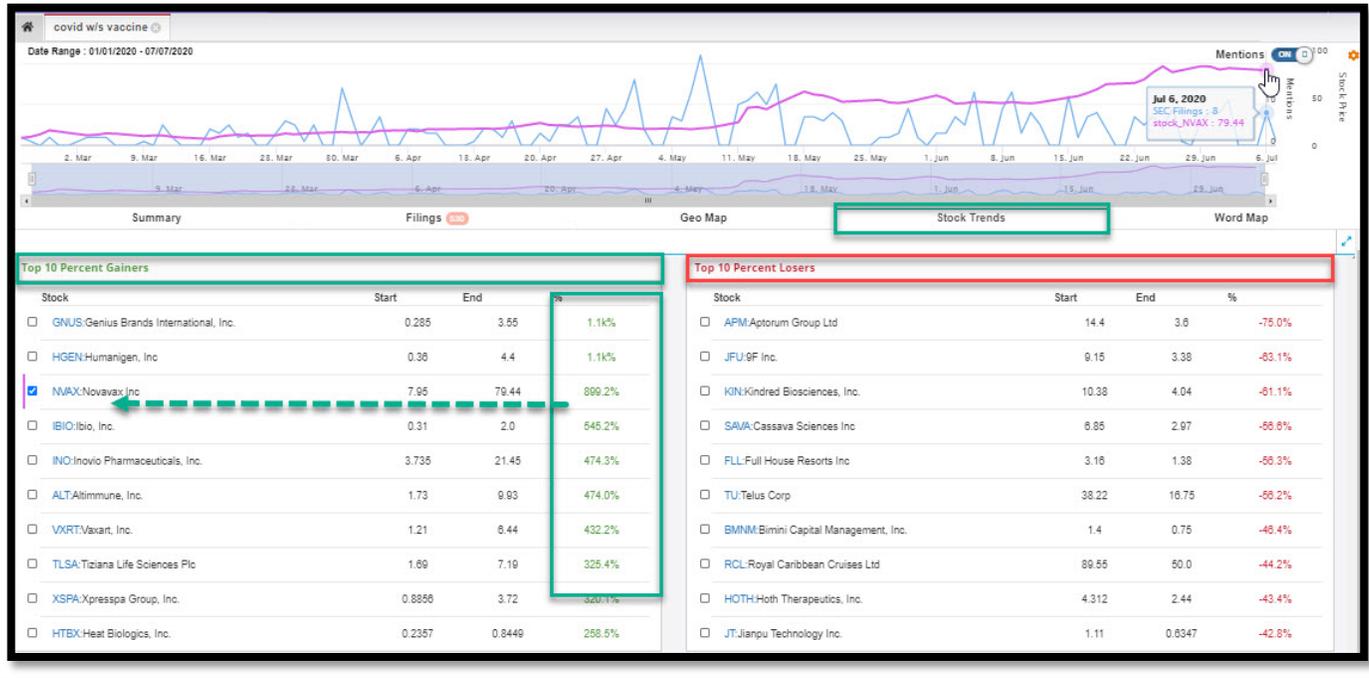


Transcripts of Earnings Calls – Read and listen to complete earnings calls with audio playback, corporate officers, and analysts/companies. Links to company profiles, interactive filter to analyst’s coverage of other companies. Completely searchable for language trends, exchange, participants, and date range.



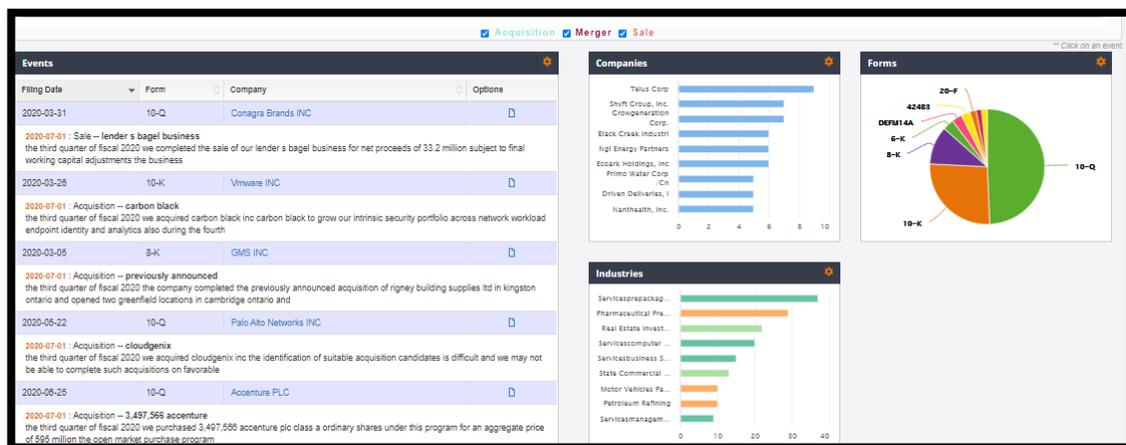
Stock Trends

Quick preview of Gainers and Losers! When your topics are found in filing disclosures, Stock Trends pre-calculates the activity and stock prices for that timeframe and displays this snapshot. Dive in to find out why.



Events: Corporate Actions – Surfaced in Real-time

No hunting or digging, Kaleidoscope surfaces critical actions that impact the financial health of companies and ultimately, investments. Screen the results by industry or access the filing. Fast, easy and factual, topics include: M&As, Executive & Director Changes, Financial Restatements, Proxy Fights and more.



Content: (For the complete itemized list, [Content & Features Data Sheet](#))

Kaleidoscope contains up-to-the minute, authoritative corporate and financial data, robust search functionality, interactive infographics as well as access to comprehensive standards and regulatory information.

- **SEC filings** for companies, funds, investment management firms, foreign private issuers and foreign governments.
- **Precedent Agreements** that are alphabetized A-Z and categorized for easy, search and retrieval.
- **Standards & Regulatory Information** on rules, news, standards, legal interpretations, litigation, and enforcement actions.
- **Corporate Profiles** on public companies.
- **Earnings Calls Transcripts** – audio playback and text.
- **SEDAR filings** (optional) for companies, funds & Canadian Standards & Regulatory Information.

Features: (For the complete list of features and functions, download Kscope Features Data Sheet)

- **Highlighted “blurbs”** – **hits in context** are highlighted for easy identification and review.
- **Dynamic, Data-driven Infographics** summarize statistics and filter results in an instant.
- **Affiliations** – Kaleidoscope maps Directors’ & Executives’ affiliations with other companies.
- **Executive Compensation Table** – Get a quick glimpse of salary and total compensation trends.
- **Stock Winners and Losers** calculated from the first day to present.
- **Compare Filings** – It’s easy to see the **additions** and **deletions** made to original documents.
- **Save and Share Searches** for collaborative activities, making your team more efficient.
- **Custom Live Reports** – Create automatically up-dating reports comprised of filings and infographic widgets that can be shared with others.
- **Custom Peer Groups** pinpoint results on specific companies avoiding the time-consuming “one-at-a-time” approach.
- **Export Options** let you export / print / view documents in Word, PDF and download financial tables and search results into XLS. Or Mass Download filings, exhibits or agreements in one group.
- **Email Alerts** – Set up unlimited alerts on subjects, people, competitors, events, customers, and suppliers.
- **XBRL and iXBRL** viewing in HTML and download to Excel.

For more information, sign up for a free 14-day trial or ask about group rates:

 sales@kscope.io or  toll free 866-572-6731