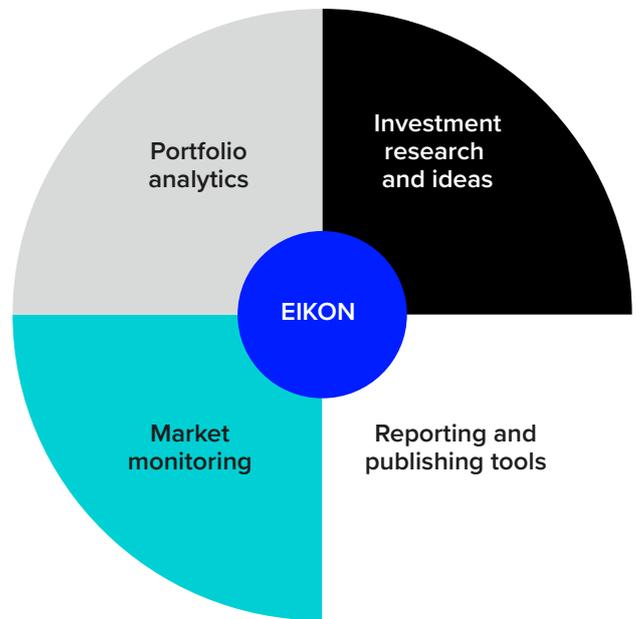


# REFINITIV EIKON – PORTFOLIO MANAGERS AND RESEARCH ANALYSTS

The ultimate set of tools and data for analyzing markets  
and portfolios



## Eikon – connected workflows across the investment cycle



Our platform has been built to integrate with the dynamics of your workflow.

Refinitiv® Eikon® is a multi-asset portfolio management, analytical and research tool with trading capabilities.

It can manage a complex spectrum of financial analysis to match your investment framework needs. The tool is accessible via the Eikon desktop platform or from Eikon Data API.

Equities	Mutual funds
ETFs	Derivatives
Cash	OTC
Commodities	FX
Corporate and government bonds	

## Portfolio analytics

Analyze and monitor your portfolios and funds using our portfolio analytic tools. Provide transparency and reporting with performance attribution and portfolio risk analytics, including Refinitiv factor models, Barra factor models\* and risk metrics\* simulation models.

### Portfolio construction and optimization

Portfolio Analytics in Eikon is a comprehensive solution for the analysis of multi-asset class portfolios. Compose and view asset allocation, security characteristics and overall performance as well as top and bottom contributors to performance.

It provides high levels of transparency with a full suite of performance attribution tools. Gauge which factors are contributing to performance at a portfolio or asset level and use risk/return profiling.

The Barra Optimizer in Portfolio Analytics combines a powerful optimization engine with Refinitiv's industry-leading content, enabling fund managers to demonstrate a more quantitative approach to portfolio construction to address index tracking, stock selection and asset allocation in an effort to maximize returns while minimizing risk.

### Portfolio Risk Analytics

Eikon Portfolio Analytics includes our proprietary Global Equity Risk Model for forecasting and quantifying portfolio risk. For multi-asset class portfolios, MSCI's RiskMetrics\* provides risk analytics – including parametric and historical value at risk measures; VaR, IVaR, CVaR and MVaR methodologies; as well as market exposure and sensitivity analysis – for monitoring and reporting on portfolio risk.

### Stress testing

Evaluating portfolio performance under different stress scenarios is an important requirement both for internal risk teams and for regulatory compliance. Stress-test portfolios with MSCI's Risk Metrics to identify, report and adjust for downside risks.

### Revolutionize backtesting with QA Point

QA Point\* simplifies workflows, making it easy to construct, validate and deploy multi-factor quantitative investment strategies – in a fraction of the time it takes using traditional quant tools.

## Investment research

Eikon allows flexible access to deep content sets to power your research. It gives you access to independent and unbiased sources to help generate accurate, timely ideas and research. Eikon delivers numerous leading quantitative, fundamental and descriptive data sets and analytical tools

### Charting

Powerful charting tools seamlessly integrated with search and other core capabilities help you quickly grasp and act on large amounts of information.

### Screening tools

Streamline your investment selection process with powerful screening tools. Eikon gives you the tools to investigate securities using a multitude of filtering criteria.

### Deep historical data from Datastream

Access the world's largest multi-asset database of financial historical data, with over 12 million economic indicators, 39 million instruments and coverage from the 1950s to the present. The primary source for building macroeconomic analysis, creating market scenarios and testing investment strategies, Datastream® is fully integrated into Eikon and can also be accessed via an API alongside Eikon or as a separate data feed.

### Eikon Excel

Access and display content where you need it. Build models in Excel® and easily link and update displays in Word and PowerPoint®.

### Global research collection

Currently we have 1,300 research contributors accessible from Eikon (with the appropriate permissions), which is a research distribution and hosting platform for broker houses and their clients. It maintains the compliance transparency required under MiFID II.

Eikon includes all major brokers and many independent research providers, covering all asset classes, including equities, fixed income, economics and ESG.

### StarMine quantitative analytics and models

StarMine® helps you simplify your stock selection process and make better and faster investment decisions. With SmartEstimates®, you can better predict future earnings and analyst revisions.

StarMine quantitative models cover valuation, momentum, earnings quality, smart money models, credit and sovereign risk models, to help you identify opportunities and make better predictions.

\*Fee liable add-on

### Access to exclusive Reuters news

Up-to-the-minute news across multiple markets with access to 10,000+ real-time newswires, global press and web news sources. Includes access to exclusive Reuters news and content.

### Global pricing data

Global, multi-asset pricing; terms and conditions; and analytics – typically with the longest history available – with data from 2,000 contributing sources.

### Company fundamentals

Our recently launched Refinitiv Company Fundamentals (RCF) has been developed as the best-in-class for company financial analysis, financial statements and valuation metrics.

### I/B/E/S® estimates

Most complete global view covering 22,000 companies in more than 92 countries. Up-to-date, industry-specific fundamental KPIs, covering 15 industries across 202 metrics, makes our database the broadest and most comprehensive.

### Datastream

The world's most comprehensive financial time series database has over 400 million series across 39 million individual instruments, over 69 years and 175 countries in all major asset classes

### Lipper® funds data

Unrivaled fund performance data ratings, analytical tools and commentary covering 330,000 collective investments in 113 countries.

### ESG data

Industry-leading standardized ESG data points (400+) and analytics (70+) – for nearly 80% of global market cap based on publicly reported company data. Rapidly measure sustainable investment decisions and support ESG factor investing.

# A data powerhouse

## 700,000

fixed income and equity indices covered

## 1.3 million

equity quotes from 325 exchanges

## 3.4 million

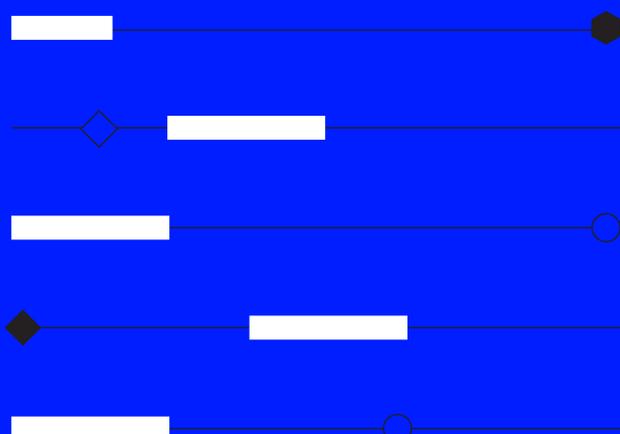
fixed income securities

## 40 billion

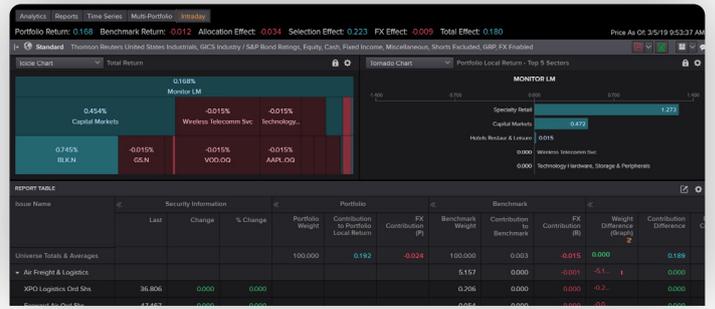
average daily data updates

## 69 years

of information



# Take a look inside some selected Eikon apps



## Portfolio Analytics

Quickly understand drivers of performance and risk exposure in your portfolio.

The Earnings Review app displays a table with columns: Company Name, Report Date, Reported Actual, Current Year, and Current Year Surprise. The table lists several companies and their earnings performance.

## Earn App

Earnings seasons gain more insight into companies reporting.



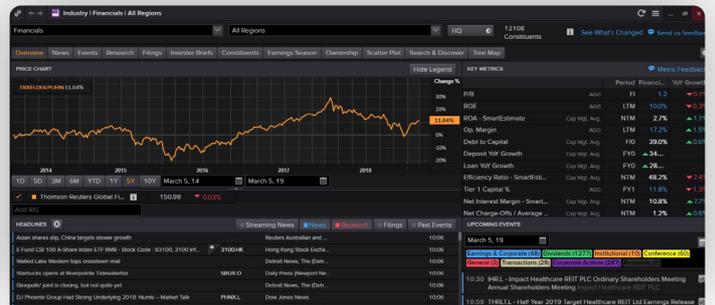
## Fund Flows App

Track investor sentiment and get a global view of investor trends.



## Market Movers (MM)

Analyze and monitor performance of indices broken down by industry.



## Industry App

Compare how companies being monitored perform in comparison to sector metrics.

The Pulse app displays a table with columns: Company Name, Activity, Price Change, Volume, Rec Change, Top Trending, News Sentiment, Events, Research, AIM, EQ, RV, IV, Val-Mo, Price Mo, CAM, and Signal. The table lists various companies and their daily activity.

## Pulse App

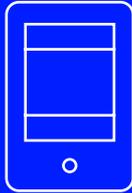
Watchlist pulse, monitor critical performance activity on securities or portfolios.



## Strategic Charting App (CHTF)

Advanced charting and technical analysis tools to identify market-moving trends.

# Access total freedom



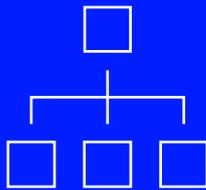
## Eikon for iPhone and Android

With Eikon's iPhone® and Android™ mobile apps, you're not tied to a single workspace. Automatically synchronized with your desktop, the mobile Eikon experience means you stay connected to all the data, news and financial content you need – whether you're in or out of the office.

## Eikon for Web

With Eikon Web Access, you don't need to install anything to gain access to Eikon's leading content, news, apps and workflows.

# Access the power of the crowd



## Eikon Messenger

Available as a stand-alone application without the need for an Eikon subscription, Messenger enables you to connect with over 300,000 financial professionals in 30,000+ firms across 180+ countries – securely and compliantly.

# Open access



## Eikon Data API

Seamlessly access Refinitiv's universe of high-value financial data via Eikon's flexible data API. You'll be able to go beyond the confines of your spreadsheets to gain more unique, deeper insight – faster.

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Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

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DATA IS JUST  
THE BEGINNING<sup>®</sup> 