



Cloud Based, Investment Process Software

Decision-Support & Analytics

Subscriptions Include

- Fundamental data on global companies through FactSet
- Data Science team assigned to your account
- Best-in-Class Idea Generation, Portfolio Construction & Risk Management
- 100% Configured to Your Workflows
- Any Data, Any Vendor, One EDS
- MSCI & Wolfe Integration
- Integrated RMS
- Decision-Support Database
- Scalable across the entire investment process lifecycle
- Deep Analytics
- Best Practices Compliance

How it Works

We provide a proof-of-value that is low risk, and high return - No commitment, our impact on your team is small, and financial costs are minimal.

www.equitydatascience.com

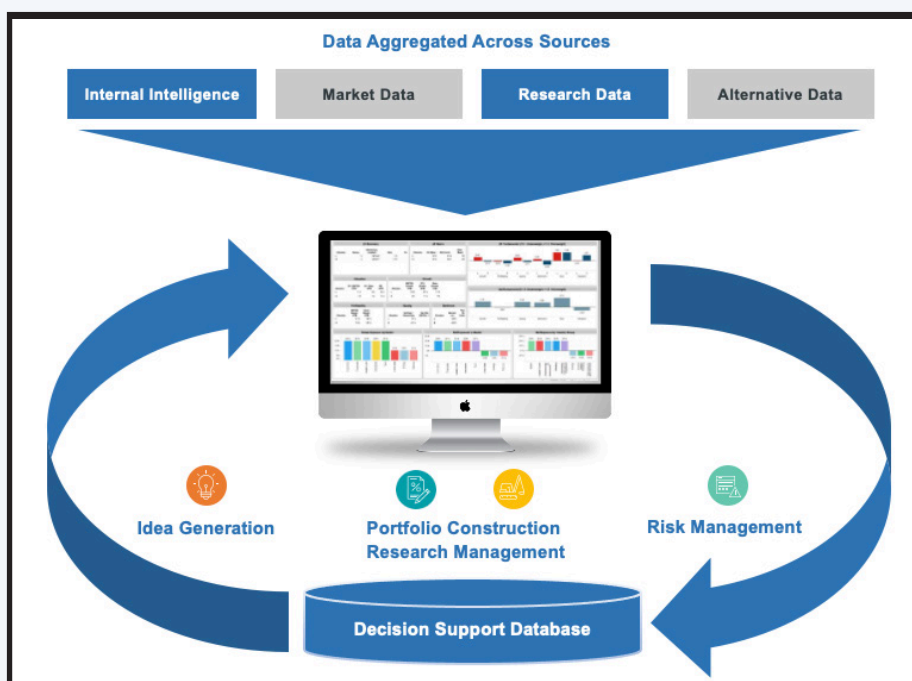
A Modern Platform for Fundamental Investing

The Way You Invest is Special. EDS Makes it Scalable

The EDS Analytics Platform has created a world where fundamental investors can leverage technology to improve their probability of success. Investment processes become more consistent and transparent. Investment teams are more productive and accountable. You have a feedback loop to analyze and improve decision making. And all your intellectual property stays in-house, under your control, in a centralized platform that is configured to your exact requirements.

Your Investment Process. More Efficient. More Measurable

Originally built inside of leading funds, EDS is a centralized decision-support and analytics platform, that helps investment teams critique and iterate their investment process - **driving continuous improvement.**



*"Firms also have invested in analytics that assess portfolio managers' actions in advance of trades and help to counteract behavioral bias in investment decisions. **The payoff has been substantial, adding 100 to 200 basis points to portfolio returns.**" McKinsey - "Achieving Digital Alpha in Asset Management"*

EDS works with many types of firms, both small and large - from providing a full investment process platform to "filling in" gaps, solving specific problems, as an outsourced data scientist, replacing existing vendors, and/or streamlining inefficient, ad-hoc excel processes. And all at a fraction of the price of competitive solutions.

How do you support your team, driving a continuous improvement mindset? EDS proves our value upfront. No Commitment. Minimal Cost. Rapid Implementation.

Enveloping the platform is the EDS Vault, a database and analytics environment that improves decision-making by analyzing "why" your team succeeds and where the blind spots are.

Clients hire EDS because we drive large improvements in efficiency & critical investment workflows through a centralized platform

"No question. EDS has helped us create increased alpha and a stronger discipline"

- Steve Galbraith, Kindred Capital,

"Working with EDS is like having a platform and full quant team on staff to support your fundamental research process...only faster, more efficient, and more reliable. Table stakes for a new era of investing." - Multi-Billion Tiger Cub

"EDS is revolutionizing proactive, thoughtful investment managers looking to leverage technology as a scalable tailwind in their proprietary process, it is like Salesforce.com or ServiceNow for investors."

- Jon Neitzell, Anduril Partners

Why EDS

Because it allows your team to fully leverage technology for maximum impact to your firm.

- Cloud based
- Secure & Private
- 100% Configurable
- Purpose-Built
- Scalable across the Investment Process
- Unmatchable pricing

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Working with Leading Firms & Fundamental Funds

Northern Trust, Tiger Cubs, Citadel Spins, SAC Alums, Asset Managers & Quants

Idea Generation

EDS optimizes all your intelligence in a centralized platform. FactSet Data & MSCI Factors included in your subscription.

- 100% configurable to your research workflows, Clients are 2-3X more productive, often times moving out of excel - saving valuable research time and improving decision-making.
- Codify your investment process and rank your universe (back-test to determine efficacy).
- Integrate any Intelligence - EDS works with leading content providers, such as FactSet, MSCI, Mlscience, Earnest Research, Wolfe Research, CFRA, InsiderScore and many others.

Portfolio Construction & RMS

Based on your inputs, ranks, votes and/or constraints, our dashboards aggregate your intelligence for optimal monitoring, position weighting & trading. Understand strengths & blind spots, Pinpoint risk & reward. Critique, measure and Iterate your investment process.

- Use all your intelligence when sizing & trading positions - ex. internal estimates & financial models, price-targets, voting, scenarios, catalysts, conviction inputs, alt data, factors, etc.
- Compare in-house estimates to consensus - track over-time to help your team focus on the inputs that matter.
- As a fundamental investor, you take copious notes - analyst & earnings calls, management & conference meeting. EDS includes a modern Research Management System (RMS) that works the way you do, with powerful search capabilities. Built for "best practices" compliance.
- EDS databases everything (excel can't do that) - catalog every change, input and decision you make - a valuable feedback loop that drives continuous investment process improvement.

Risk Management

Utilize MSCI's (or another vendor) leading intelligence, factors & ESG to better manage risk & exposure. With EDS, your team becomes more prepared and proactive.

- Best Practices risk, including factor exposures.
- Simulation & Optimization - Stress & screen across any metric, security or factor.
- Risk & Return Attribution - By fund, team, strategy, analyst, stock, PNL, factors, etc.
- Customized Reporting for investment teams or marketing.
- Monitor changes in short-term expectations (earnings events, crowding, ownership).