EDS

EQUITY DATA SCIENCE

Cloud Based,
Investment Process Software

Decision-Support & Analytics

Subscriptions Include

- Fundamental data on 10,000+ 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 Integration
- Integrated RMS
- Decision-Support Database
- Scalable across the entire investment process lifecycle

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 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 Process. More Systematic. More Efficient. More Measurable

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

Interactive User Portal and Mobile App

"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 measure your investment process?

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.

Continued on back

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,

"EDS does two things for us. We are much more efficient and automated. More Importantly, it helps us to be better investors"

- 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

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).
- A modern research management system (RMS) - configurable research notes that are always up-to-date (investment thesis, pre-earnings, and/or post-earnings views, etc.).
- Integrate any Intelligence - EDS works with leading content providers, such as FactSet, MSCI, M|science, Earnest Research, Wolfe Research, CFRA, InsiderScore and many others.

Portfolio Construction

Based on your inputs, ranks & 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 inputs when sizing & trading positions - ex. internal estimates & financial models, price-targets, 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.
- 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 Barra's leading intelligence, factors & ESG to better manage risk & exposure. With EDS, your team becomes more prepared and proactive.

- 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).