

REFINITIV[®]

WORKSPACE

WEALTH ADVISORS – ADVANCED

REFINITIV[®]
WORKSPACE



**FOR WEALTH
ADVISORS –
ADVANCED**

An LSEG Business

REFINITIV[®]


REFINITIV[®] WORKSPACE FOR WEALTH ADVISORS – ADVANCED

Content and applications quick reference guide

Refinitiv Workspace for Wealth
Advisors – Advanced

Portfolio Monitoring and Management		
Portfolio Monitoring	Portfolio Analytics Suite of products with real-time/delayed pricing (Intraday and Dashboard) and associated applications such as Pulse and Monitor	✓
Portfolio Management	List and management storage and maintenance. Portfolio and Lists Manager and Portfolio Tracker are basic list management tools that can be found across wealth variants	✓
Quote List (Monitor)	Full list monitoring capabilities leveraging Refinitiv analytics and data	✓
Portfolio Analytics/Intraday	Single and multi-portfolio application exposing real-time/delayed data across multi-asset portfolios	✓
Portfolio Tracker	Core monitoring tool for current portfolios with limited pricing data	✓
Portfolios Fixed Income	Multi-asset risk valuation editors and import features and tools	✓
Portfolio Analytics Integration Services	Consultancy-based service to assist with ingestion of portfolios via SFTP process feeding from back-office systems and custodians. Fees are applied based on number of portfolios loaded (continuously on a daily basis if required) and the length of back history needed	✓
Client Portfolio Dashboard	View multiple client portfolios versus benchmarks, indices or other portfolios. Analyse at fund level or access underlying holding data via fund roll-up view. Full charting capabilities to compare portfolios and key movers	✓
Monitoring tools		
Monitoring Tools	Displays historic/real-time prices/quotes/turnover, monitoring of economic data and market indices broken down by classifications. Central alerting tool available across Workspace and Eikon [®]	✓
Fixed Income	Compare a list of bonds against selected curves. Shows broker volume for given instrument	✓

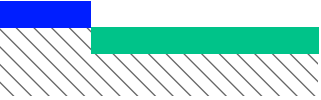
		Refinitiv Workspace for Wealth Advisors – Advanced
Company		
Company Data	Peer Analysis, Reuters Investor Briefs, Top Analysts, VWAP, Officers and Directors, Interactive Income Statement, Historical Surprise, Filings, Dividend Overview, Dividend Payment Detail, Detail Estimates, Deals Tearsheet, Company Snapshots, Company Estimates, Company Fundamentals, All Quotes, Short Interest	✓
Refinitiv® Stock Reports Plus	Combines Refinitiv's independent research, ratings and market data for companies within 50 global markets. It places current data into historical context for a more accurate forecasting of a security's performance	✓
Environmental, Social and Governance Data for Companies	Full coverage and history of scores and ratings for complete set of ESG data. Key statistics cover recent ratings for core metrics with further breakdown	✓ Sustainability Leadership Monitor
Environmental, Social and Governance Data for Funds	Full breakdown of ESG fund scores and key overview ratings	✓
Estimates	Global Consensus Estimates, including SmartEstimates®	✓
Events	Full coverage across corporate actions, analysts calls, earnings releases, IPOs, dividends, M&A announcements with all history included. Transcripts for 7,000 companies. Briefs on over 1,000 companies	✓
Company Fundamentals	Global fundamentals coverage on over 88,000 companies. Full history includes data from 1981 (Americas), 1983 (Emerging Markets) and 1990 (Frontier Markets) for annual data – including active and inactive companies. Key company metrics allowing for easy comparison in advanced variants	✓
Refinitiv® StarMine® Models	Global quantitative stock rankings for fundamental top-down or bottom-up analysts, and quantitative multifactor models. Quantitative Research Group develops specific models, used as inputs into multifactor models and fundamental processes. Value-added analytics, used as inputs for proprietary factors	✓
Peers	Comparisons of peers, as well as companies in the same sectors and indices	✓
Officers	Overview and details including: titles, biographies, age, as reported and standardised compensation/options	✓
Filings	Filings from all global exchanges, including partial coverage of private companies, fixed-income-related documents and Delta Reports	✓
Ownership	Global ownership coverage, including shareholders and screener reports	✓

		Refinitiv Workspace for Wealth Advisors – Advanced
Company continued		
Deals	Deals data coverage	✓
Private Company	Private company analytics/overview	✓
People	Global coverage of people	✓
Markets		
Equity	Constituents and weights. ICW content and history of global index coverage. Global Level 1 Exchange coverage with conflated (three-second) real-time and delayed data. Global Level 2 Exchange coverage. Availability subject to permission from third parties. Full pricing time series coverage up to 25 years	✓ Summary Level 2 data, full access to ICW constituents (based on subscription)
Fixed Income	Real-time coverage of government benchmark bonds, coverage of corporate bond prices, real-time evaluated bond pricing for government and corporate bonds, summary terms and conditions (principal/coupon info, issuance details, ratings and security identifiers)	✓ Access to TradeWeb, MarketAxess and Markit data
Bond Calculators	Fixed-rate calculator, advanced calculators (convertibles, floating rates, index linked, municipals). Access to premium fixed-income applications including municipals data	✓
Guides, Other	Full fixed income guide covering convertibles, corporates, government, municipals, floating rate, index linked, credit default swaps, interest rate swaps. debt repayment schedule, DCM Pricer	✓
Derivatives	Global exchange coverage of futures, options and warrants	✓ Includes exclusive access to German, Swiss and Austrian securitized derivatives
Foreign Exchange and Money Markets	Real-time global coverage of spots, crosses, forwards and deposits. Some contributed coverage. Central banking and interbank offered rates. FX swaps/outrights and fixings. FX News Monitor, real-time gold spot rate	✓
FX Polls	Major currency pair forecasts by FX contributors	✓
FX Cross Matrix	Calculate cross-rates for any combination of 1,500 currencies, based on market or calculated rates	✓

		Refinitiv Workspace for Wealth Advisors – Advanced
Markets continued		
Real Estate	Real estate guide and coverage, overview, news, events	✓
Commodities	Global exchange-traded futures and options coverage, full suite of commodity guides (power, metals, agriculture, carbon)	✓ Commodity guides and documents but not all features
Economics Monitor	Real-time global coverage of economic indicators and events	✓ Polls, forecast and actual data
Macro Explorer and MacroVitals	Macro Explorer and Global Connections. Visually explore region-level macroeconomic, sector-level aggregate and security-level fundamental data. MacroVitals	✓
Refinitiv® Lipper®	Global fund coverage with over 230,000 share classes covered in 61 markets, most notably in North America, Central and Eastern Europe, Asia and Middle East and Africa. Access to fund profile including fees, minimum investment, yield, benchmark, classification and fund scores data. Fund Views and Fund Screener. Price Performance data to enable historical analysis from a fund's inception date. Fund flows and fund classifications. Full suite of fund views including full holdings and history; Global data coverage (both Mutual and ETF) including Fund classification & scores, history summary holdings, distributions, all share classes, overview, top 10 holdings and quantitative analysis. Full ESG ratings analysis and fund screener	✓
Fund Documents	Fund documents sourced from FundInfo provide access to key mutual fund documents such as KIID documents and fact sheets	✓
Screen and search		
Fund Screener	Specialised fund screener	✓
Screener	Full screening capabilities through powerful screener application	✓
Search & Discover	News-related search	✓
Private Equity Screener	Screen on private equity and venture capital investments based on relevant criteria	✓
OTC Interest Rate and Derivatives Search	Search across OTC interest rates and derivatives content	✓
M&A Search	Mergers and acquisitions search capabilities	✓

		Refinitiv Workspace for Wealth Advisors – Advanced
Screen and Search continued		
CMO/ABS Search, CDS Indices, Loans Search	Ability to search through advanced asset classes such as CDS, indices and loans	✓
Advanced Events and Filings Search	Search events and filings by multiple contexts	✓
News and Research		
Research and Publishing	Internal research overview, advanced research, company research	✓
Research	Third-party research based on subscription to individual brokers	✓ Real time research available dependant on agreement with sell-side research firms
News and Commentary	Reuters Insider, Reuters Breakingviews, Reuters Top News, News Monitor and News Top Guide, Domestic News, News Wire – 15 months, Web News – two years, Global Press – 20 years	✓
Domestic News	Regional and country-specific news coverage. Domestic news included	✓
Global News	Global Newswire, Full Reuters News for Equities and Relevant Cross-Asset News, Top News and Breakingviews	✓
Decision News and Social Media	Decision News, Social Media Monitor, News Discovery	✓
Specialist Research	Islamic research, One Access, GFMS research	✓
Analytics and Calculators		
General Calculators	FX, Equity and Futures, Options, Index Fair Value, Rates, Swaps, Derivatives, Commodities, Fixed Income, Credit, Cross Market calculators, Regression Analysis, Correlation	✓ Access to most calculators on asset types such as CDS
Analytics Tools	Total Return, MBS Aggregations, volatility indices, Monitor	✓
Microsoft® Office		
Microsoft® Excel®	Add-on capability to work in Excel	✓
Datastream® for Office	Microsoft Office add-in for Datastream data	✓

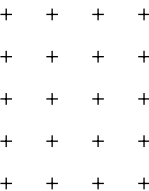
		Refinitiv Workspace for Wealth Advisors – Advanced
Charting		
Standard Charts	Basic financial and yield curve charts	✓
Advanced Charts	RRG and yield map charting for specific instruments	✓
Datastream Chart Studio	Chart Studio and Chart Studies	✓
Other capabilities		
Alerting	Central alert management tool for data notifications (market data, news, filings, events, economics, investor briefs)	✓
Messenger	Refinitiv® Messenger: collaboration tool with ability to share apps and workspaces. Connect to other Workspace users, stand-alone Refinitiv Messenger users and third-party instant messaging networks	✓ Free of charge add-on
Briefcase	Tool for accessing information offline	✓
My Files	Storage and access to proprietary files for example shared layouts	✓
Mobile Application (Smartphone/Tablet)	Access to Eikon and Refinitiv Workspace apps designed for iPhone®, BlackBerry®, Android™ or tablet. View news and market data, fundamentals, estimates, deals, filings, top investors and officers and directors, personal watchlist to track the companies you cover	✓
Web Access	Support for Chrome™ and Internet Explorer®. Adaptive views for key applications	✓
Interoperability (side-by-side) API	Allowing other applications to link and interact with Refinitiv products	✓
Desktop API	The desktop content for key information through an API	✓
Intelligent Search Capabilities	Using natural language processing to find information based on your search	✓
Customisable Display	Layouts and tiles enabling the customisation of the work space	✓
Regional offerings		
Wealth Order Management	Order entry system available in New Zealand and Australia (fee-liable add-on)	✓



Refinitiv Workspace for Wealth Advisors – Advanced

Wealth tools		
Wealth Practice 360 Views	Understand client accounts and access all relevant information to your managed portfolios. Fee-liable add-on. In addition, client will be charged a fee based on the number of accounts loaded into the application	✓
House Views and Market Insights	Content management system and workflow enablement tool that allows firm-wide communication of recommended investments and associated documents. Fee-liable add-on – manage convictions from advisory, associated documentation, audit trails, through to creation of reference/model portfolios. Initial charge for onboarding with Professional Services	✓

*Please note the above reference card is intended as a guide only. Please consult with your local Refinitiv representative for more detailed information regarding a specific section.



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Refinitiv, an LSEG (London Stock Exchange Group) business, is one of the world’s largest providers of financial markets data and infrastructure. With \$6.25 billion in revenue, over 40,000 customers and 400,000 end users across 190 countries, Refinitiv is powering participants across the global financial marketplace. We provide information, insights and technology that enable customers to execute critical investing, trading and risk decisions with confidence. By combining a unique open platform with best-in-class data and expertise, we connect people to choice and opportunity – driving performance, innovation and growth for our customers and partners.

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