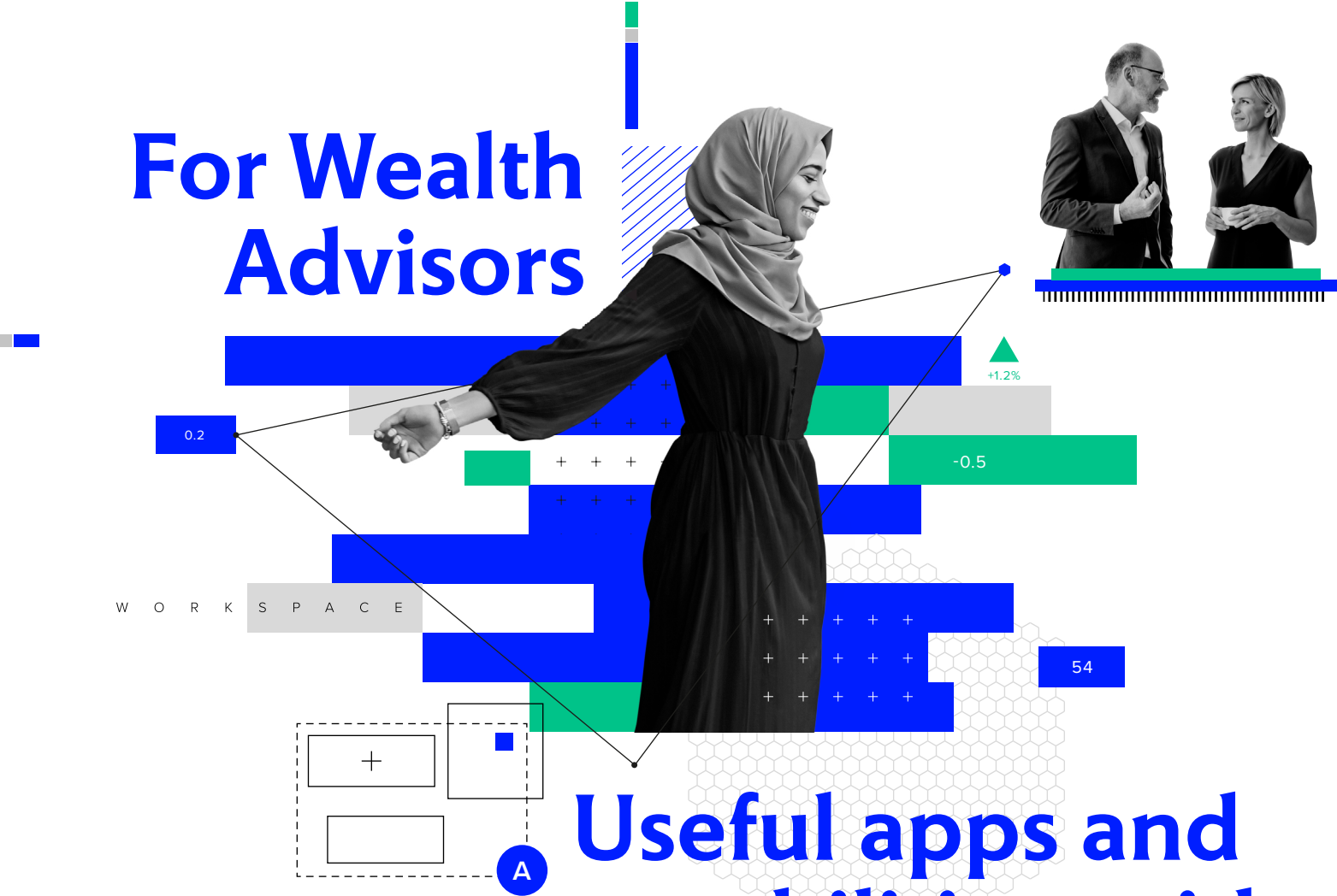


For Wealth
Advisors



Useful apps and
capabilities guide



Why Workspace for Wealth Advisors

Workspace for Wealth Advisors is a client-centric platform that combines cutting-edge technology, leading market data, trusted news and workflow tools to improve productivity and deepen client engagement – delivering what wealth management firms need to thrive in this rapidly changing market.

- **Designed to address** wealth workflows and tailored to key wealth advisor activities
- **Flexible technology** with a light HTML5 open framework which allows for interoperability
- **Intuitive navigation** in a browser-like environment
- **Intelligent search** with improved relevancy and performance, delivering more relevant insights
- **Web-based access** offering parity between Web and installed versions
- **Self-administration** tool to deploy layouts and custom menu navigation across the firm
- **Industry-leading alternative data** sets including LSEG environmental, social and governance (ESG) data, LSEG Stock Reports Plus and LSEG StarMine models
- **Enhanced news**, events and commentary from Reuters and other news sources, including Reuters domestic news in local languages
- **Enhanced portfolio analytics** capabilities supporting cross-asset attribution, contribution, performance and risk analysis



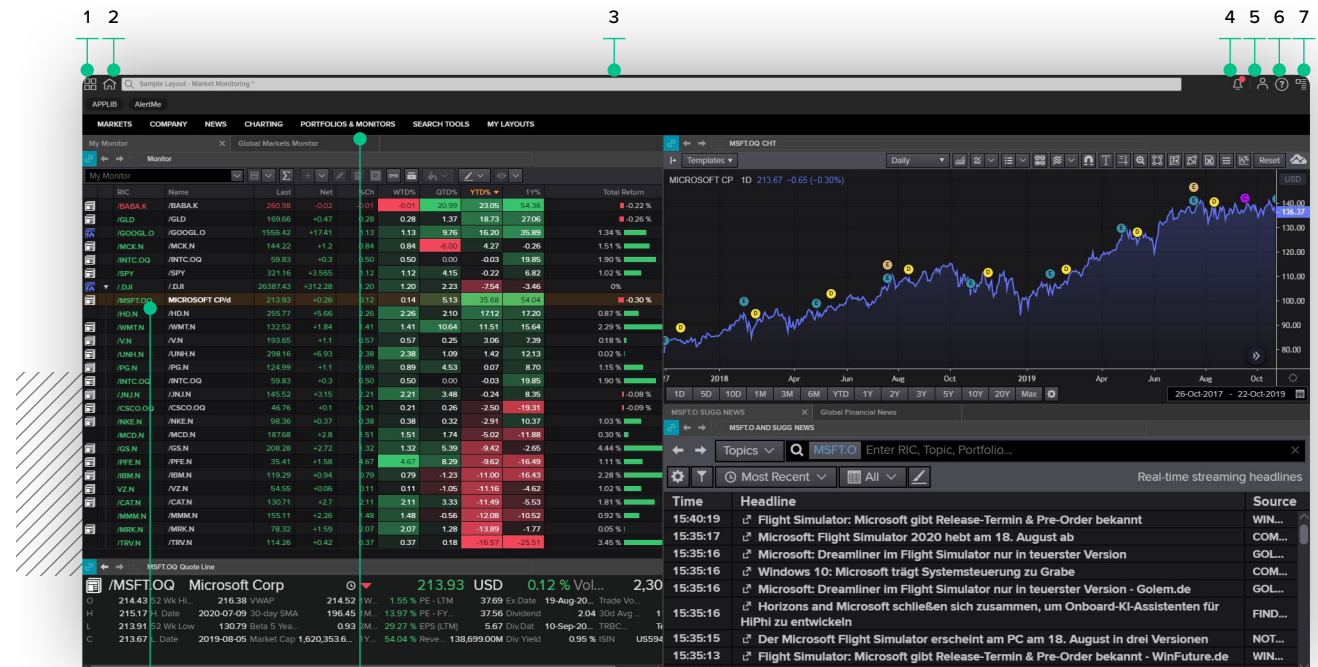
Find everything you need in your customisable homepage

To access: click the **HOME BUTTON** in the top left corner

Home is your personalised desktop, giving you an overview of everything that's most important to you. Customise the apps and information you want to see on your homepage to simplify your workflow and improve efficiency.

Search and Workspace navigation bar

1. App library
2. Home button
3. Search bar
4. Alert center
5. Profile menu
6. Help
7. App enu



Personalise your home screen to show up to four different apps, arranged to your preference.

Key apps relevant to your job role.

Tip: If you don't see these apps, you need to change your job role in the Profile Menu.

Tip: You can save any page or layout you are viewing as your homepage.

1. Go to your chosen app.
2. From the profile menu, select **Set as Start Page**.

Dive deeper with Intelligent Search capabilities

To access Intelligent Search: start typing in the **SEARCH BAR**

The new Intelligent Search provides improved relevancy and performance with instant access to content in the search window. Results are tailored to the needs of the user via an enhanced auto-suggest.

Searching

You can use search to find data or apps from the main search bar.

Use natural language:

- Type in the entity you want to view
- Optionally add the specific data or apps

Filter for specific data:

- Use '!' to select a content type
- Find apps or data within that content type

Smart search:

- Type in an entity and a set of parameters will appear. Click on one to select
- Then press **Tab** to move on to the next parameter. Once complete, it will instantly perform the command

The screenshot displays the Market Monitoring application with several components:

- Main Table:** A table of stock data with columns for RIC, Name, Last, Net, %Ch, WTD%, QTD%, YTD%, 1Y%, and Total Return. Stocks listed include ANADARKO PETE, GAZPROM, ALIBABA GRP ADR, MCKESSON CRP, EDWARDS LIFE, UNTO ST OIL FUND, SPDR S&P 500, GENERAL DYNAMICS, SPDR GOLD SHARES, DIAMOND BAK ENGY, ALPHABET INC A, TOYOTA MOTOR CO, BNP PARIBAS, INTEL CORP, TOTAL, HELMERICH PAYNE, BARCLAYS, CENTERPOINT, FOX CORP A, and ELI LILLY.
- Chart:** A line chart showing the price movement of SPX CHTF over time, with a peak around May and a subsequent decline.
- News Monitor:** A section displaying global financial news headlines, such as "BUZZ: Aurora Cannabis: Dips on report of BoFA downgrade" and "TOP NEWS: Emerging Markets".
- Search Windows:**
 - Natural language search:** A window titled "IBM debt - Debt Structure Comparables (IBM) for L..." showing search results for IBM debt structure comparables.
 - Filtered search:** A window titled "RICs" showing search results for RICs only, with filters for Tickers, Private Companies, Apps, and Commodities.
 - Smart search:** A window titled "IBM CHT GT=CS" showing search results for IBM CHT GT=CS, with filters for Time Range, Interval, Analysis Type, Volume, and Stochastic Slow.

Get a full overview of your client's portfolio and performance

To access: type **PORTF** into the search box

Align your portfolios with investment objectives and improve client satisfaction by creating customised reports and monitoring daily performance. **Portfolio Analytics** connects you to the right mix of news, macroeconomic data, analytics, markets and professional networks, filtered by your precise needs, and displayed on the world's most intelligent, intuitive and open desktop or mobile application with cross-asset capabilities.

The screenshot displays the Refinitiv Portfolio Analytics interface for a 'Refinitiv Diversified Multi Asset Model PORT'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options like 'UNIVERSE', 'BENCHMARK', 'CLASSIFICATIONS', 'AS OF DATE', 'OPTIONS', 'TIME FRAME', 'CURRENCY', 'TEMPLATES', and 'WIDGETS LIBRARY'.
- Top Navigation:** Includes tabs for 'MARKETS', 'COMPANY', 'NEWS', 'CHARTING', 'PORTFOLIOS & MONITORS', 'SEARCH TOOLS', and 'MY LAYOUTS'.
- Main Content Area:**
 - Portfolio Summary:** Displays key metrics such as Portfolio Name, Benchmark Name, Currency, Portfolio Value, As Of date, and Number Of Securities.
 - Major Asset Class / Lipper Global Classification:** A pie chart showing the distribution of assets across different classes.
 - Asset Type:** Another pie chart showing the distribution of assets by type.
 - Top Holdings:** A table listing the top holdings with their respective weights.
 - Top Issuer Exposures:** A table listing the top issuer exposures with their respective weights.

Annotations point to specific features:

- Select various analytical tools and views.** Points to the 'Analytics' tab in the top navigation bar.
- Choose your portfolio from the universe.** Points to the 'UNIVERSE' section in the left sidebar.
- Export your summary to PDF or Excel®.** Points to the export icons in the top right corner.
- Access our widgets library to customise your layouts and views according to your needs.** Points to the 'WIDGETS LIBRARY' section in the left sidebar.
- Access a range of predefined templates, templates created within your firm, templates shared by others and your own saved templates.** Points to the 'TEMPLATES' section in the left sidebar.
- Choose your benchmark portfolio for comparison as well as various other factors such as classifications, date, options, time frame and currency.** Points to the 'BENCHMARK' and 'CLASSIFICATIONS' sections in the left sidebar.

Access and share in-house conviction lists and research

House Views and Market Insights is your 'one-stop shop' to streamline your investment ideas, conviction lists, internal research and model portfolios.

Our content management system facilitates the distribution of proprietary investment information and offers you the ability to blend internal and external data sources with relevant market data and news, all connecting investment strategy with different in-house teams.

View the House Views in either underweight, overweight or neutral, based on the filters selected.

Access your list of portfolios created in House Views and Market Insights.

View and create conviction lists.

Create users and roles, and view the history log for actions performed by each user.

Approve convictions with maker/checker capabilities.

Access user management activities in the dashboard.

View a list of convictions for various asset classes.

Create a new conviction to add to your list.

Export your list to Excel.

RIC	Security	PRR	ESG Combined	Currency	Last	1D (%)	YTD (%)	12m Fwd P/E (%)	12m Fwd P/B (%)	12m Fwd Div Yield(%)	Ex.Date	Country	Status	Conviction List
ATM.NZ	A2 Milk Company Ltd	4	C	NZD	20.26	-3.84	34.88	32.6	12.83	0	N/A	New Zealand		Global Growth
1299.HK	AIA Group Ltd	4	B+	USD	72.59	0.88	11.24	17.97	1.8	1.83	03 Jun 2020	Hong Kong		N/A
AMP.AX	AMP Ltd	3	C	AUD	1.75	-0.28	-8.61	14.11	1.23	0	N/A	Australia		N/A
I	AT&T Inc	4	C	USD	30.25	0.16	23.2	9.23	1.15	6.92	09-Jul-2020	United States of America		Global Growth
ABB.NS	Abb Ltd	3	A+	USD	23.39	0.42	0.08	26.89	3.68	3.35	30-Mar-2020	Switzerland		N/A
ADH.AX	Adairs Ltd	5	C	AUD	2.44	4.72	6.55	12.64	2.87	1.04	N/A	Australia		N/A
ADSGN.DE	Adidas AG	4	A	EUR	238.5	-1.6	-17.7	11.95	6.55	0.59	N/A	Germany		Trade
AR.NZ	Air New Zealand Ltd	5	B	NZD	1.34	2.68	-54.26	N/A	1.02	0	N/A	New Zealand		N/A
AIR.PA	Airbus SE	5	C+	EUR	67	-3.2	-48.65	15.82	8.5	0.3	N/A	Netherlands		N/A
3932.T	Akatsuki Inc	4	N/A	JPY	3745	-2.34	-35.97	9.52	1.51	1.2	29-Sep-2020	Japan		N/A
BABA.K	Alibaba Group Holding Ltd	5	D+	CNY	243.56	0.25	17.48	26.85	5.11	0	N/A	China		Asia Dividend
AMC.AX	Amcor PLC	3	B+	USD	15.19	-0.39	-2.44	16.3	3.19	4.37	27-May-2020	United Kingdom		N/A

Stay on top of breaking news stories and events

To access Top News: type **TOP** into the search box

Workspace for Wealth Advisors includes an intuitive and customisable **News Monitor app**, allowing you to filter and refine news results to your specific needs. Our **Top News app** shown here, contains the biggest business and political stories that move markets and make headlines around the world in an easy-to-use format. Organised by sector and region, the Top News content is updated 24/7.

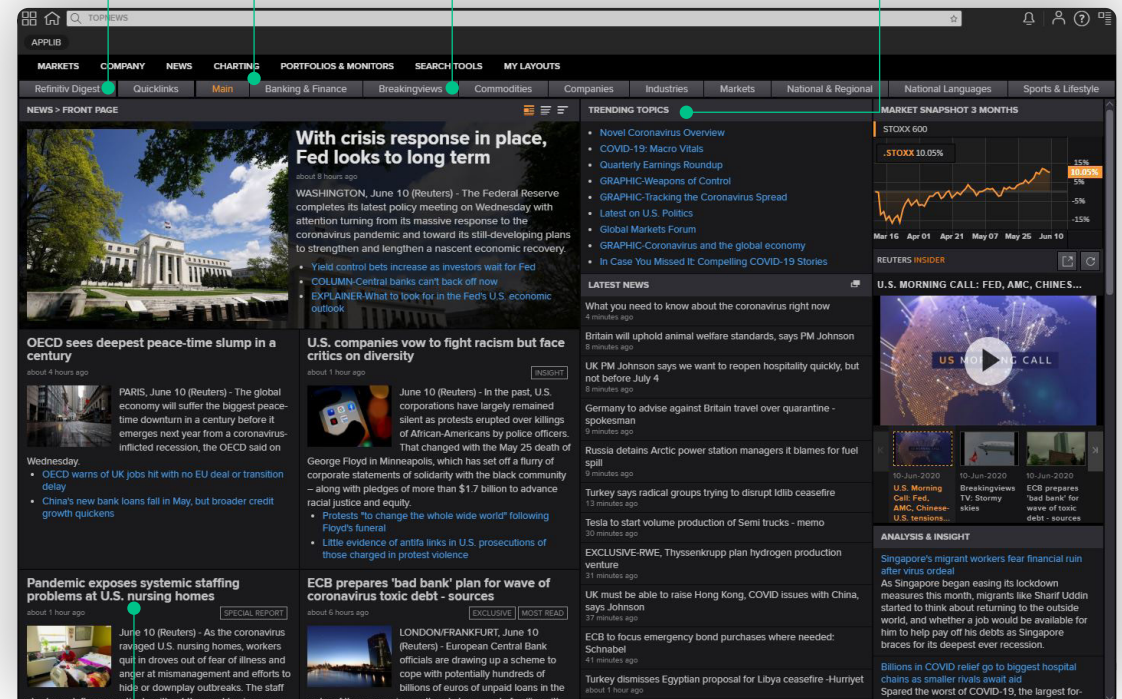
Create a curated news page with LSEG Digest, showing key headlines and insights related to portfolio holdings and/or areas of interest to you and your clients.

Explore news under specific categories.

Get market-moving commentary and insight from our Breakingviews® team.

Tip: Sign up to get Breakingviews email alerts for up-to-date analysis.

Click through to current, trending topics.



Click on any headline to access the full story, related news, journalist contact information and other key functionality.

Quickly find the news and events that matter the most to you

To access: type **PULSE** into the search box

Monitor the market through the **Watchlist Pulse app**. Start here for a broad view of significant activity across your portfolio or watch list and create quotes and quotes lists. Be alerted on changes to recommendations, new research releases and events, to focus your efforts into the right areas and help you understand why markets might move.

The screenshot shows the Watchlist Pulse app interface. The top navigation bar includes tabs for MARKETS, COMPANY, NEWS, CHARTING, PORTFOLIOS & MONITORS, SEARCH TOOLS, and MY LAYOUTS. Below this is a search bar with the text "Dow Jones Industrials Watchlist Pulse". The main content area displays a table of financial data for various companies, including columns for Identifier (RIC), Company Name, Market Cap, 1-day Price PCT Change, P/E, ROE Common Equity, Curr Div Yield, Total Debt to Total Equity, Price to Book Value, Income At Tax Margin, and Price to Per Share. Annotations with lines pointing to specific features are as follows:

- Select your universe (portfolio, watch list or index).** Points to the search bar at the top.
- Access related information at a portfolio or index level.** Points to the "Daily Activity - Pulse" tab.
- Click on the cog to access user preferences.** Points to the gear icon in the top right corner.
- Export to Excel, PDF or a quote list.** Points to the export icons in the top right corner.
- Create new templates or use existing ones.** Points to the "Add Column" button.
- Add columns with key financial information you want to monitor, including fundamentals, estimates, StarMine and ESG metrics.** Points to the "Add Rank" button.
- Add multifactor ranking.** Points to the "Group" button.
- Group your list by country, sector or industry.** Points to the "Group" button.

Identifier (RIC)	Company Name	Market Cap (USD) (\$-Avg)	1-day Price PCT Change (\$-Avg)	P/E (Daily Time Series Ratio) (\$-Avg)	ROE Common Equity, Pct. Trailing 12 Mos (\$-Avg)	Curr Div Yield, Pct. Annualized (\$-Avg)	Total Debt to Total Equity, Percent (\$-Avg)	Price to Book Value Per Share (Daily Time Series Ratio) (\$-Avg)	Income At Tax Margin, % FY (\$-Avg)	Price to Per Share
Summary (30)		278,022,263,274	-1.5%	23.6	26.3%	2.92%	143.7%	1.7	15.6%	
AXPN	American Express Co	88,917,151,780	-2.8%	16.7	25.2%	1.56%	596.3%	4.2	15.0%	
AAPL.OQ	Apple Inc	1,490,967,896,650	3.2%	27.0	62.1%	0.90%	119.4%	19.0	21.2%	
VZ.N	Verizon Communications Inc	239,424,414,133	-0.4%	13.0	31.7%	4.26%	181.6%	4.0	15.0%	
BA.N	Boeing Co	122,311,875,059	-6.0%	NA	NA	3.80%	NA	-12.7	-0.7%	
CAT.N	Caterpillar Inc	72,628,903,546	-2.6%	14.2	35.7%	3.08%	258.1%	5.1	10.9%	
JPM.N	JPMorgan Chase & Co	336,817,908,824	-2.6%	12.5	12.2%	3.27%	197.5%	1.3	31.5%	
CVX.N	Chevron Corp	189,554,342,335	-1.7%	50.3	2.6%	5.10%	18.7%	1.3	2.0%	
CSCO.OQ	Cisco Systems Inc	202,881,332,506	-0.2%	17.7	32.0%	2.92%	73.5%	5.7	24.1%	
KO.N	Coca-Cola Co	210,449,676,297	-1.7%	21.1	55.8%	3.27%	225.3%	11.6	24.1%	
DIS.N	Walt Disney Co	223,778,386,790	-2.7%	46.6	5.4%	0.00%	52.9%	2.4	15.6%	
XOM.N	Exxon Mobil Corp	226,293,866,207	-2.2%	21.5	5.7%	6.52%	24.6%	1.2	5.5%	
HD.N	Home Depot Inc	276,151,250,817	0.0%	25.5	NA	2.34%	NA	-79.2	10.2%	
INTC.OQ	Intel Corp	266,911,360,000	-1.0%	12.2	30.3%	2.10%	37.3%	3.5	29.2%	
IBM.N	International Business Machines Corp	117,086,312,370	-2.9%	12.8	50.3%	4.93%	301.8%	5.9	12.4%	
JNJ.N	Johnson & Johnson	384,545,418,329	-0.6%	22.8	28.6%	2.61%	46.6%	6.3	18.4%	
MCD.N	McDonald's Corp	148,354,329,433	-1.5%	26.1	NA	2.51%	NA	-16.0	28.8%	
MSFT.OQ	Microsoft Corp	1,439,336,958,881	0.8%	33.5	41.7%	1.08%	77.0%	12.6	29.2%	
MMM.N	3M Co	95,885,235,046	-0.1%	19.6	50.1%	3.54%	203.2%	9.4	14.3%	
NKE.N	Nike Inc	159,593,214,750	-1.6%	38.0	48.0%	0.96%	38.5%	17.6	10.3%	

Visualize performance and analysis through advanced charting capabilities

To access: type **CHT** into the search box

A next-generation charting platform contained in an easy-to-use interface. Visualise ideas, plot event impact and start technical analysis across our cross-asset universe. The **Financial Chart app** has real-time and historical pricing data with a suite of technical analysis functions across a range of market instruments.

Change your line type; include statistics in your chart, autoload industry, peers and sectors.

Change frequency.

Access 100+ technical analysis options.

We have created a whole range of drawing tools to enhance, highlight and mark key performance milestones in charts.

View the data on a table.

Look at the historical price change.

Reset your chart.



Add additional securities to show absolute price, rebase, performance or total return. The addition of total return is new to Workspace.

Select from various date range options, allowing you to quickly change your chart time frame, providing easier navigation.

Add analysis, trend lines or event markers.

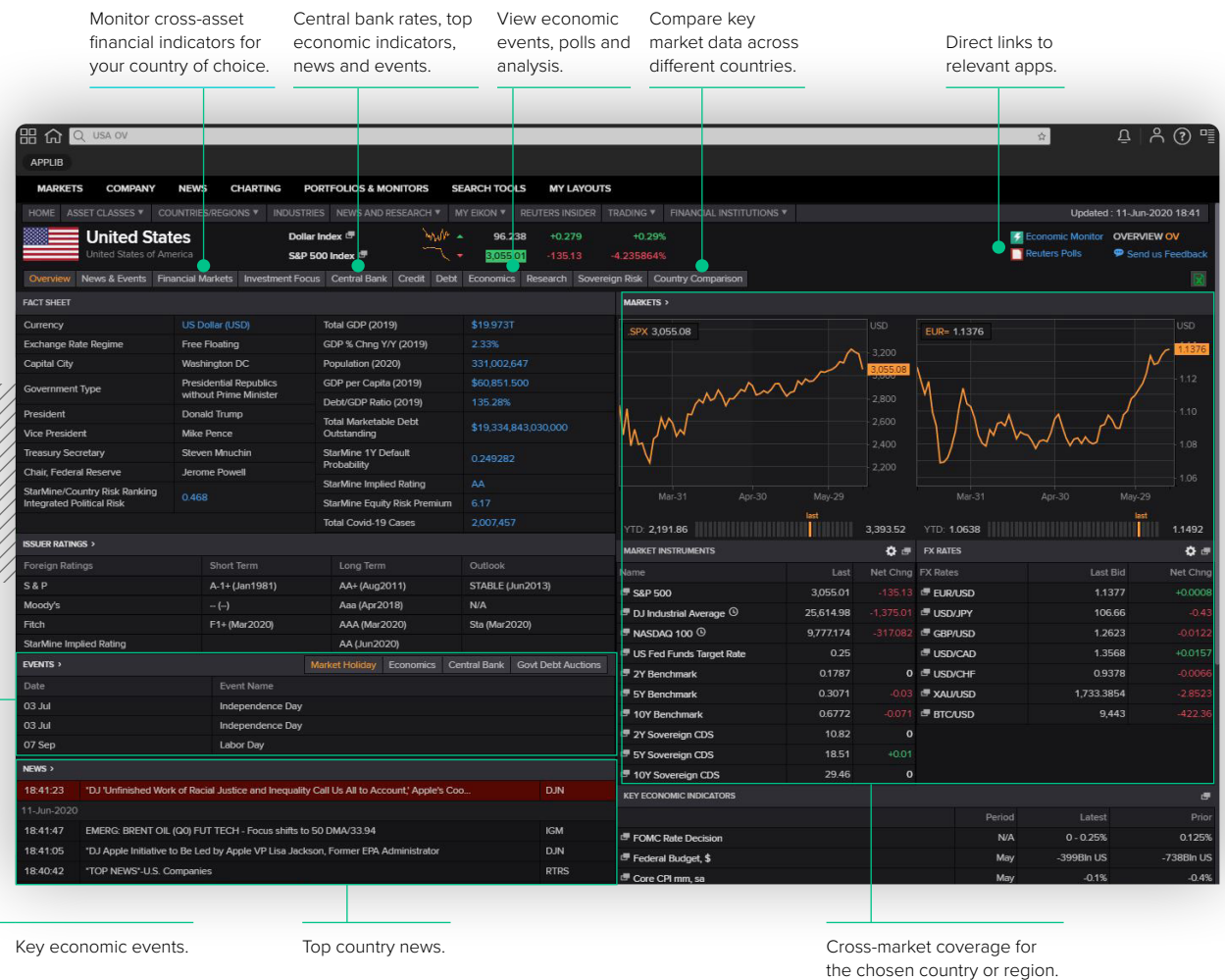
Export to Excel.

Input date range and use the slide or date button to choose the time frame.

Get comprehensive country and region overviews

To access: type a **country name** into the search box

Take a top-down approach to country analysis with our class-leading macro data all in one page. Stay in touch with economic events and news and compare across regions.



Get a comprehensive overview of mutual funds and exchange-traded funds

To access: type a **fund name** into the search box

Funds Overview gives you access to LSEG Lipper fund data with over 280,000 mutual funds, classifications and leader ratings as well as screening and construction tools. Along with news, prices, analytics and the latest discussion for funds, you also get access to fund documents including KIIDs, fact sheets and prospectuses.

Funds Overview now also includes LSEG Lipper fund ESG Scores, providing independent fund-level scores which describe the sustainability of a particular investment fund. With 10 category levels and three pillar levels, the overall ESG scores are rolled up from the fund's market value-weighted company-level scores and help you objectively assess the ESG performance of a fund.

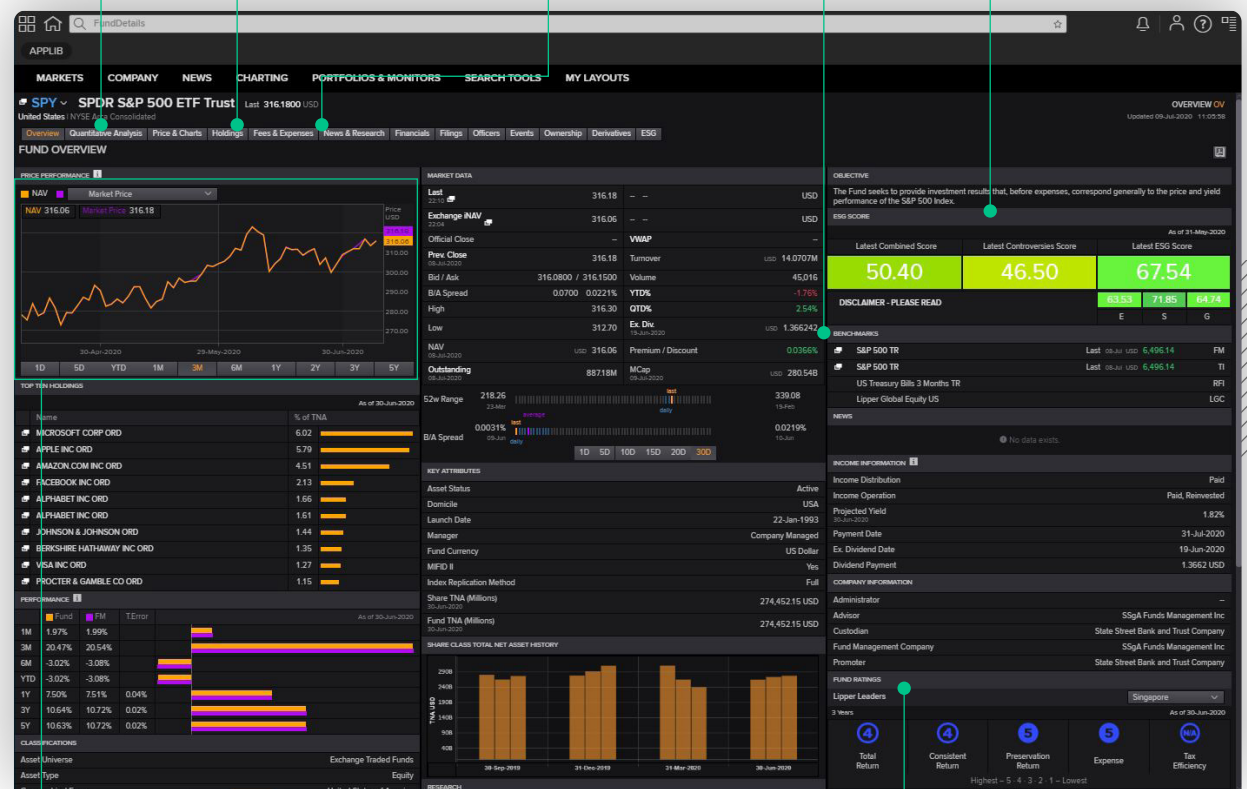
Access additional fund performance information and quantitative analysis tools.

View extensive holdings information, including allocation breakdowns for currency, asset type, country and region.

Access the latest fees and **Schedules** applicable to US domiciled funds.

View key benchmarks a fund is being tracked against.

View the latest LSEG ESG score across three datasets, including: ESG score, combined score and controversies score.



Compare the performance of a fund to a number of market benchmarks in percentage format using a line chart.

View the LSEG Lipper Leaders fund ratings and assess the fund across five criteria.

Access comprehensive private and public company overviews

To access: type a **company name** into the search box

Kick off your analysis on a given public or private company, drill into company fundamentals, or analyse news and research and start your workflow quickly.

Access Reuters first-class news and the largest collection of broker research reports in the marketplace.

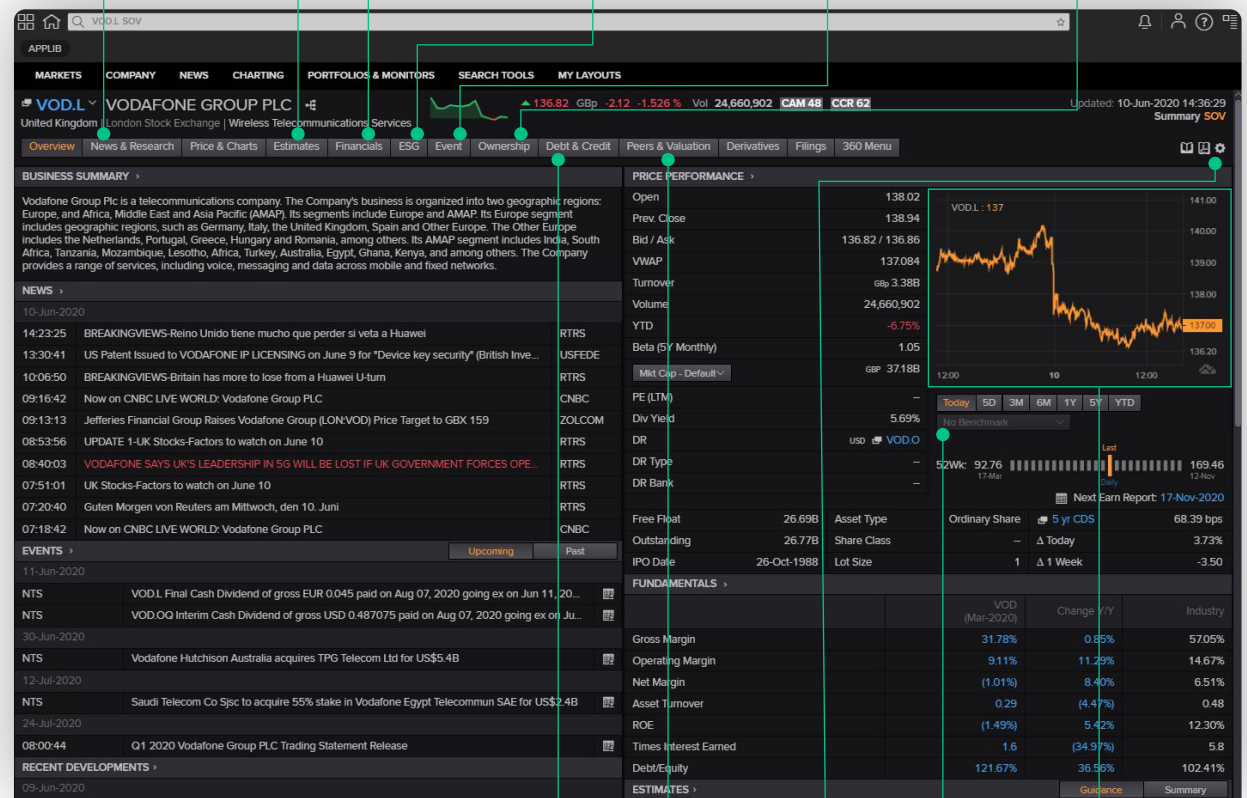
Access to brokers' recommendations and target price.

Drill into the last five years of financial statements.

Access ESG data pertaining to the company, including an ESG and controversy score.

Stay on top of corporate events affecting your portfolio and synchronise them with Microsoft® Outlook®.

See who the top holders are and who's buying and selling this security.



Analyse the outstanding debt of a company.

Compare a company against its competitors with peer analysis.

Create a PDF with key company information.

Change benchmark.

Drill into pricing, history, liquidity and performance and use the charts to perform technical analysis.

Stay on top of economic events and forecasts

To access: type **EM** into the search box

View real-time macroeconomic calendar and predictions to help you see what is affecting the markets and impacting your investment day with the **Economic Monitor** app.

Open the side menu to quickly choose the countries/regions you wish to monitor.

Filter by date.

Select your event types and market impact.

Make sure you click the **Update** button.

Export to Excel.

Click to change to calendar view.

The screenshot shows the Economic Monitor app interface. On the left is a side menu with a list of countries and regions, each with a checkbox. The main area displays a table of economic events. At the top of the main area, there are filters for date (set to 'Yesterday to Next 7 Days'), event types (set to 'All Event Types'), and search items. There are also buttons for 'Not Rated' and 'Update'. The table has columns for Local Date, Count, Local Time, Indicator Name, Period, Reuters Poll, Actual, Surprise, Prior, Revised, Min, Max, Count, Smart, Predict, and Surprise. The table is filtered to show events for '9TH JULY 2020, 11:59:26'. A 'Manage Columns' button is visible. At the bottom, there is a section for 'REUTERS NEWS FOR SWITZERLAND UNEMPLOYMENT RATE ADJ' with a list of news items and their timestamps.

Local Date	Count	Local Time	Indicator Name	Period	Reuters Poll	Actual	Surprise	Prior	Revised	Min	Max	Count	Smart	Predict	Surprise
30 Jun-8 Jul		15:00	REPO Rate	Q3		1.85%		1.85%							
1-8 Jul		12:00	Budget Balance - ILS	Jun		-12.2B		-17.9B	-17.8B						
1-8 Jul		13:00	Foreign Reserves	Jun		38,202B		36,004B							
1-8 Jul		15:00	All Car Sales	Jun		2,970M		2,650M	2,730M						
1-8 Jul		15:00	All Truck Sales	Jun		10,070M		9,560M	9,610M						
1-8 Jul		22:00	Tax Revenues	Jun		545,960B		499,53...							
1-8 Jul			CPI YY	May		-2.71%		-1.86%							
1-8 Jul			CPI MM	May		0.09%		-0.09%							
8 Jul		01:50	Bank Lending YY	Jun		6.2%		4.8%							
8 Jul		01:50	Current Account NSA JPY	May	1 088.2B	1 176.8B	88.60B	262.7B		833.0B	1 375.0B	17	1 062.32i	-25.88B	
8 Jul		01:50	Current Account, Goods	May		-556,809B		-966.5...							
8 Jul		01:50	Current Account Bal SA	May		821 100M		252 40...							
8 Jul		01:50	Trade Bal Cust Basis SA	May		-541 200M		-1 023 ...							
8 Jul		02:08	Retail Sales Index YY	May		-20.6%		-16.9%							
8 Jul		07:00	Economy Watchers Poll SA	Jun		38.8		15.5							
8 Jul		07:45	Unemployment Rate Unadj	Jun		3.4%	3.2%	-0.20%	3.4%	3.3%	3.5%	4	3.37%	-0.03%	
8 Jul		07:45	Unemployment Rate Adj	Jun		3.6%	3.3%	-0.30%	3.4%	3.2%	3.6%	3.7%	9	3.61%	0.01%
8 Jul		08:00	GDP Month	May		1.9%		-4.0%	-3.8%						
8 Jul		08:00	GDP Month Mainland	May		2.4%		-4.7%	-4.8%						
8 Jul		09:00	Trade Balance	Apr		-217.4M		-20.9M							
8 Jul		09:00	Retail Sales YY	May		-6.5%	-0.7%	5.80%	-10.6%	-10.5%	-8.0%	-5.0%	9	-6.33%	0.17%

REUTERS NEWS FOR SWITZERLAND UNEMPLOYMENT RATE ADJ

8 Jul 2020

07:46:20 RTRS TABLE-Swiss unadj. jobless rate falls to 3.2% in June

07:45:00 RTRS SCHWEIZ - ARBEITSLOSENQUOTE IM JUNI BEI 3.2 PROZENT, SAISONBEREINIGT BEI 3.3 PROZENT (PROGNOSE 3.6 PROZENT)

07:45:00 RTRS SWISS JUNE UNADJ JOBLESS RATE AT 3.2% (VS 3.4% IN PVS MONTH) - GOVT DATA

07:45:00 RTRS SWISS JUNE ADJ JOBLESS RATE AT 3.3% (VS 3.2% IN PVS MONTH) - GOVT DATA



Receive news on highlighted events.



Click through to see Reuters Poll results.

Track market expectations with first-class Reuters Poll data.

Monitor global market performance in real time

To access: type **MACROX** into the search box

Visually explore region-level macroeconomic data, sector-level aggregate data and security-level fundamental data in order to quickly and easily monitor global market performance in real time, with the **Macro Explorer app**.

Select analysis by region, sector or security.

The Workspace manager lets you customise and select the content, countries, frequency and dates for the data you want to view.

Choose your focus for comparison across selected countries.

Choose different visualisations for selecting countries for detailed information and comparison.



Filter across focus areas to easily narrow down and find the specific data you are looking for.

View graphs and charts for comparison of selected countries.

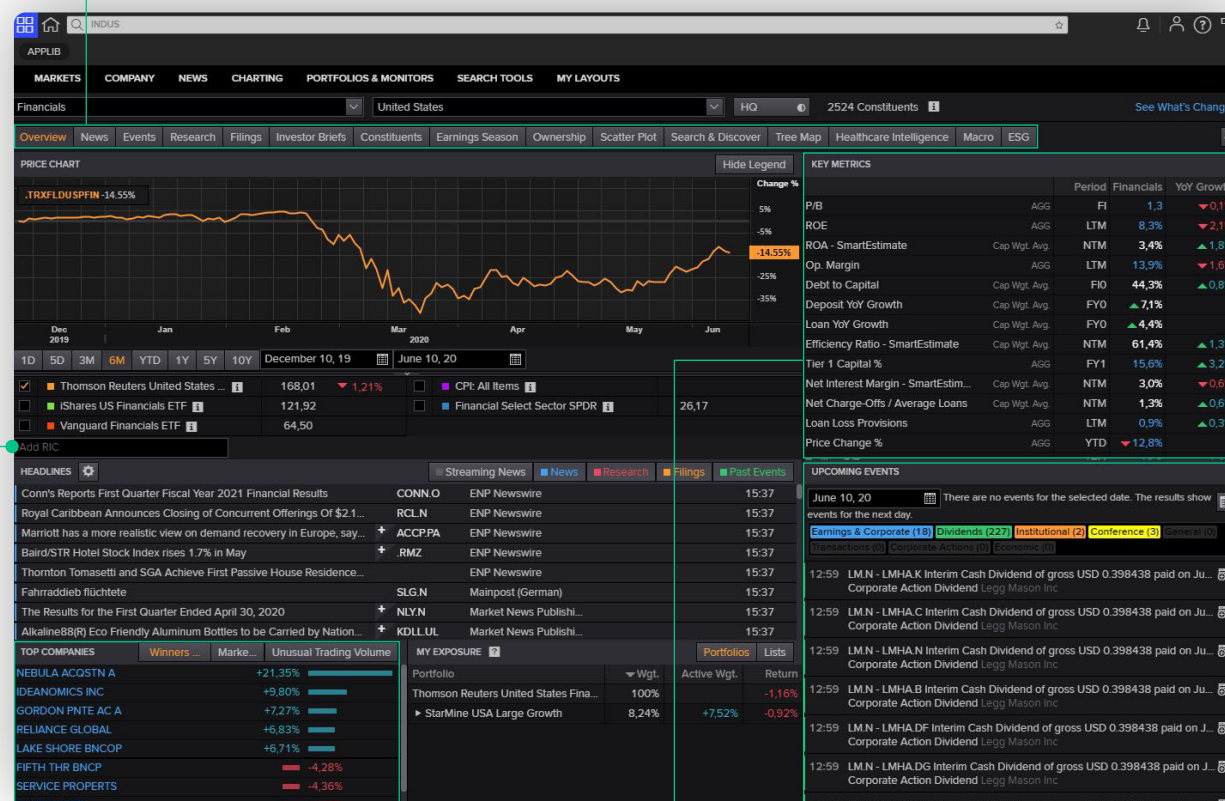
Select different views and charts for comparison, as well as related news and events.

View industry-specific activity and information

To access: type **INDUS** into the search box

View consolidated industry activity, allowing you to quickly scan and act on market-moving information. The **Industry Overview** app allows you to deep dive into the key content relevant to the selected industry and its companies across price performance, key industry metrics, news, research and more.

Access related information for the industry constituents.



Toggle between suggested indices or add your own.

See the top/bottom performers by percentage change of market cap.

View key metrics for that industry, including aggregated KPIs, fundamental and valuation measures, and economic indicators.

Never miss an up-and-coming event.

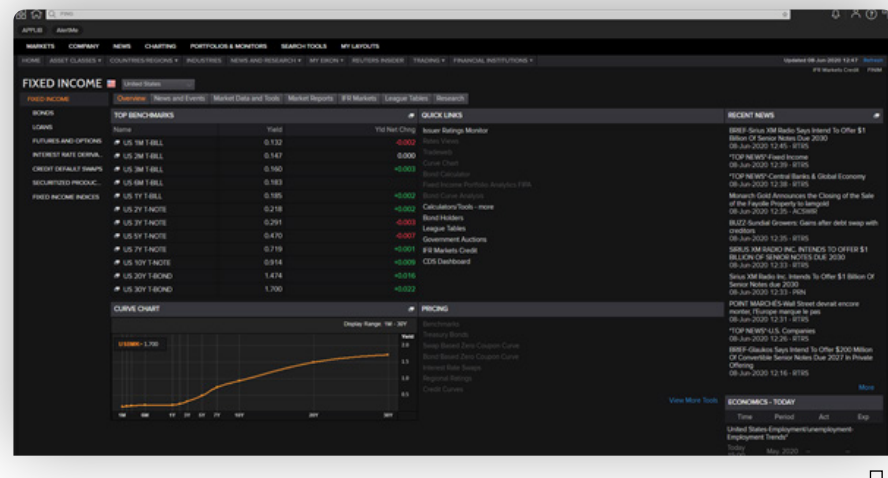
Fixed income

Access to summary terms and conditions, real-time benchmark, evaluated pricing, and corporate and agency pricing, as well as a basic bond calculator.

The **Fixed Income Guide** provides news, prices, analytics and discussions for fixed income markets, giving you everything you need to stay up to date and make informed decisions.

Other useful apps:

Bond View (BV), All Quotes (ALLQ), Bond Calculator (BNDC)



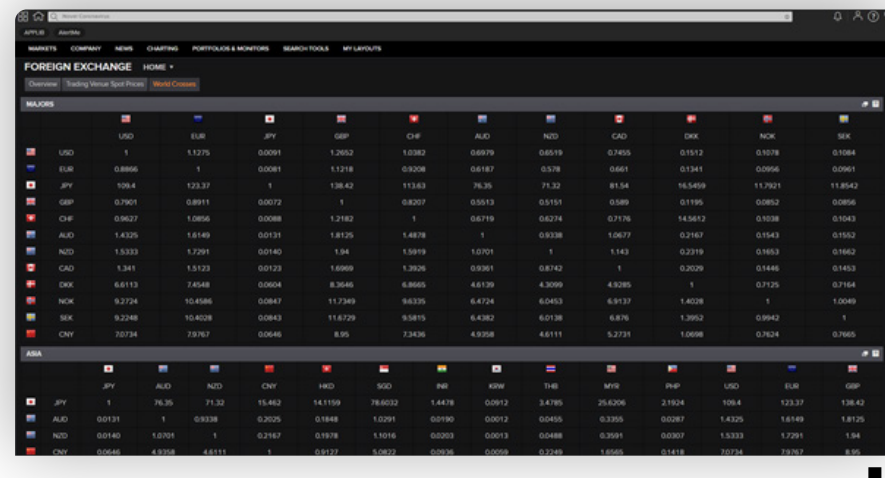
Foreign exchange

Full coverage of spots, crosses, forwards, depots, central banking and interbank offered rates, and FX swaps and fixings data.

The **Foreign Exchange Guide** provides an overview of data, pricing and news for foreign exchange, money market, economic data and commodities.

Other useful apps:

FX & Money Advanced Search (FXMMSRCH), FX News Monitor (FXNM), FX Global Code Guide (FXGC)



Generate unique ideas, leverage alternate data and deliver greater value

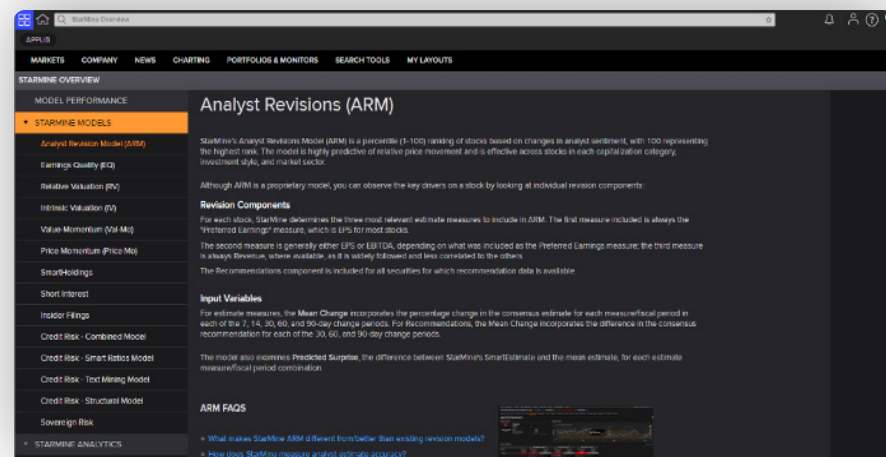
Workspace for Wealth Advisors provides a wide variety of unique data sets and analysis, including proprietary alternative data such as ESG and StarMine models. These data sets, combined with powerful applications, enable you to generate new ideas, provide differentiated advice and create investment strategies that drive value for your clients.

StarMine models

Achieve higher returns with StarMine's suite of proprietary alpha-generating analytics and models, grounded in sound economic intuition and backed by rigorous analysis:

- StarMine models output percentile ranks between 1 and 100, with 1 representing the lowest-rated stocks and 100 indicating the highest-rated stocks. There are currently 14 models

For more information on our StarMine models and analytics, visit the application: **StarMine Overview (STARMINE)**

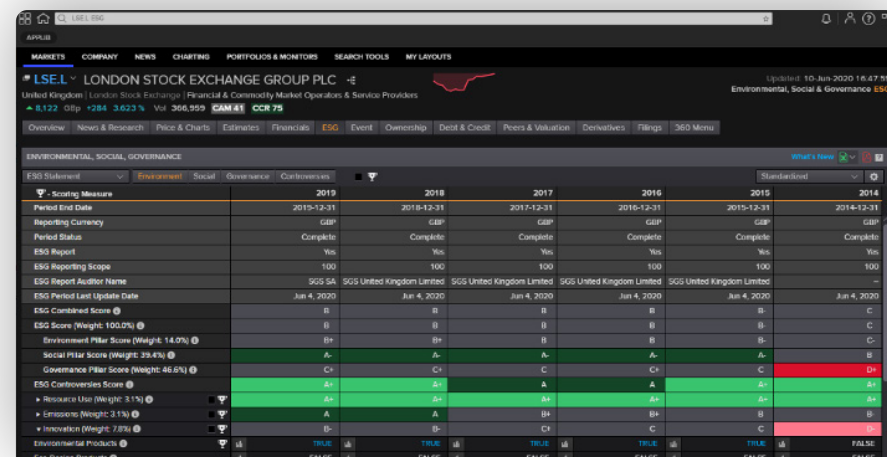


ESG data

Issues such as climate change, diversity, human rights, business ethics and corporate governance are at the forefront of public and political attention. Investors are increasingly demanding that these issues be factored into their portfolios and investment mandates. Some LSEG ESG data stats:

- Transparent ESG data and scores for over 8,000 global companies, with 400+ ESG data points and 70+ ESG analytics
- Customised analytics and ranks to meet specific ESG requirements

For more information on our ESG data, visit the application: **Environmental, Social and Governance Overview (ESG)**



Optimise your investment selection process

To access application: type **SRPLUS** into the search bar

The LSEG **Stock Reports Plus** app uses independent stock research, analysis and data to help you optimise your investment selection process, generate compelling ideas and save time researching. The app provides various reports that can be downloaded and accessed directly from the search bar.

Use the search box in the application to search for specific equities.

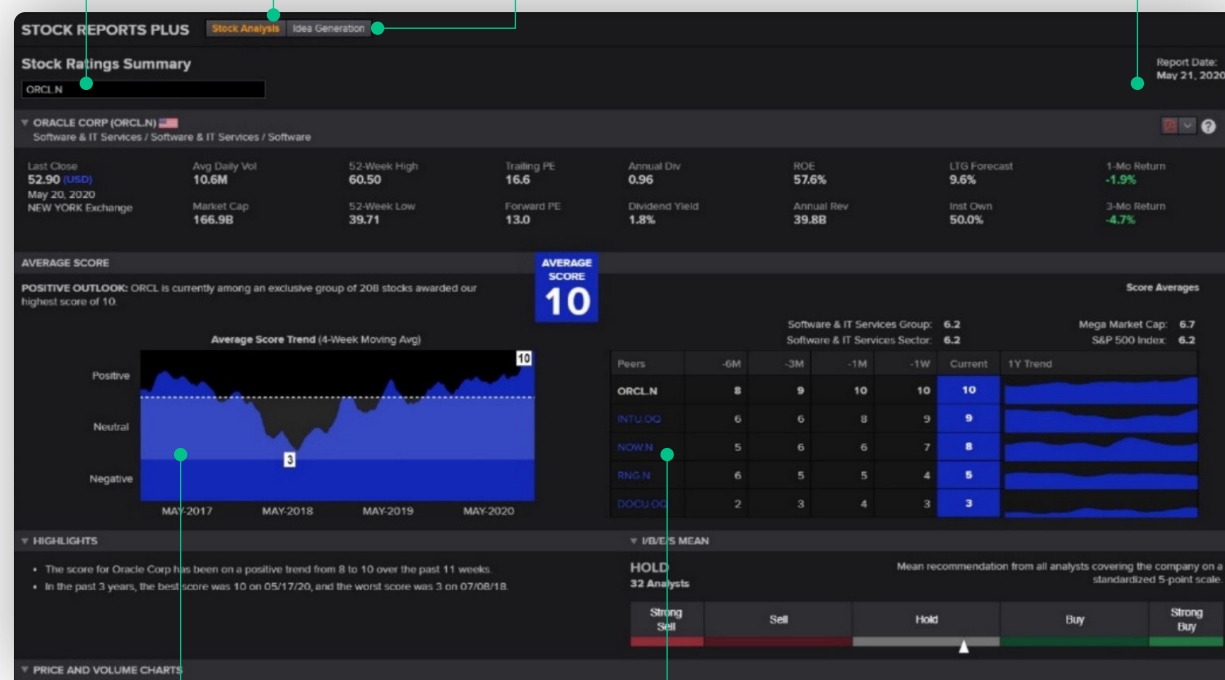
Toggle between the Stock Analysis and Idea Generation tabs.

The Idea Generation tab gives you access to various analysis and reports that can be viewed, saved or downloaded, including:

- Positive/negative changes
- Best/worst ratings
- Bullish high yields

View and download PDF reports in different formats:

- Summary (two-page)
- Condensed (five-page)
- Detailed (10-page)



Overall average stock rating score and average score trend graph over time.

Click on any blue field heading in the Stock Analysis Summary reports to view a definition for the field.

Screen and filter market data to cut through the noise

To access: type **SCREENER** into the search box

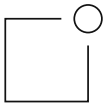
Finding the information you need can be time-consuming and nearly impossible in today's market. The **Screeener app** allows you to scan across global securities, using broad content sets such as Fundamentals, Industry KPI, LSEG I/B/E/S® estimates and LSEG proprietary StarMine models. Use the **Fund Screener app** to search and screen for funds from our LSEG Lipper database, using a wide range of criteria.

The screenshot shows the Screener app interface with several annotations:

- Load a sample screen, or choose Create New to start from scratch.** Points to the "SCREEN" button in the top navigation bar.
- Choose a universe of public/private companies, index, portfolio or watch list.** Points to the "UNIVERSE" dropdown menu.
- Add columns for different views and data.** Points to the "Add Column" button in the top right of the table.
- Export the results to a spreadsheet, create a list or save to a PDF.** Points to the export icons in the top right corner.
- Toggle view between grid and scatter plot.** Points to the view toggle icons in the top right corner.
- Click Quick Filters to choose from popular filters, or start typing over New Filter to define a custom filter.** Points to the "QUICK FILTERS" section on the left sidebar.

The main table displays a list of companies with columns for Company Name, Company Market Cap (USD), Analyst Revisions Model Region, Price Momentum Mid Term, Earnings Per Share - SmartEstimate, and Revenue - SmartEstimate Growth. The table is currently showing 49 securities.

Company Name	Company Market Cap (USD)	Analyst Revisions Model Region	Price Momentum Mid Term	Earnings Per Share - SmartEstimate	Revenue - SmartEstimate Growth
LMT.N	115,188,805,225.50	77	47	10.4%	6.1%
CDNS.OQ	25,517,691,800.00	79	84	12.2%	9.5%
CHE.N	7,244,362,534.16	98	52	15.7%	8.9%
CHD.N	18,144,423,735.01	87	37	10.0%	6.7%
DG.N	46,734,674,586.48	90	56	29.2%	15.1%
LOW.N	98,882,713,441.75	100	94	13.9%	5.6%
ATVI.OQ	53,494,805,140.65	99	55	23.3%	12.3%
MSFT.OQ	1,419,620,014,238.40	71	51	20.1%	12.5%
PTC.OQ	9,688,335,391.94	72	84	31.3%	8.1%
RGLD.OQ	8,034,994,289.16	99	79	76.6%	19.2%
VRTX.OQ	68,887,228,814.21	93	54	72.5%	45.2%
WST.N	15,142,187,395.09	92	81	11.7%	6.8%
SNPS.OQ	27,589,809,719.79	78	86	15.6%	8.0%
SMG.N	7,469,465,485.26	74	81	20.8%	9.0%
TSCO.OQ	14,121,906,595.60	81	91	19.4%	12.8%
PEGA.OQ	7,889,731,606.17	90	85	126.8%	16.9%
DPZ.N	14,724,360,457.98	100	42	20.0%	9.7%
NVDA.OQ	219,432,000,000.00	98	88	41.1%	34.3%
BMRN.OQ	19,132,539,364.80	79	80	312.8%	11.7%
AKAM.OQ	16,065,172,728.00	94	98	10.1%	7.4%



Alerting

Get customised alerts to know when prices change or research or news is released, and receive email or in-app reminders for economic and company events – all synced with Workspace.



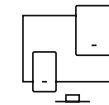
Microsoft® Office® functionality

Workspace enables advisors to analyse and present content in Excel and other Microsoft Office products. Build models in Excel and easily link and update displays in Word and PowerPoint®.



Workspace app

The new Workspace application helps make Workspace even more accessible. While working from home, on the move or at the office, you can have a seamless digital experience across devices for instant access wherever you need it.



App studio

Workspace's ever-growing suite of innovative tools means you can build, tailor and simplify your workflows. Create your own apps, choose apps from a range of our brightest fintech partners and achieve uniquely tailored solutions for your business.

For training and information:

Access the [LSEG Workspace for Wealth Advisors Training Page](#) or contact your LSEG representative.

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