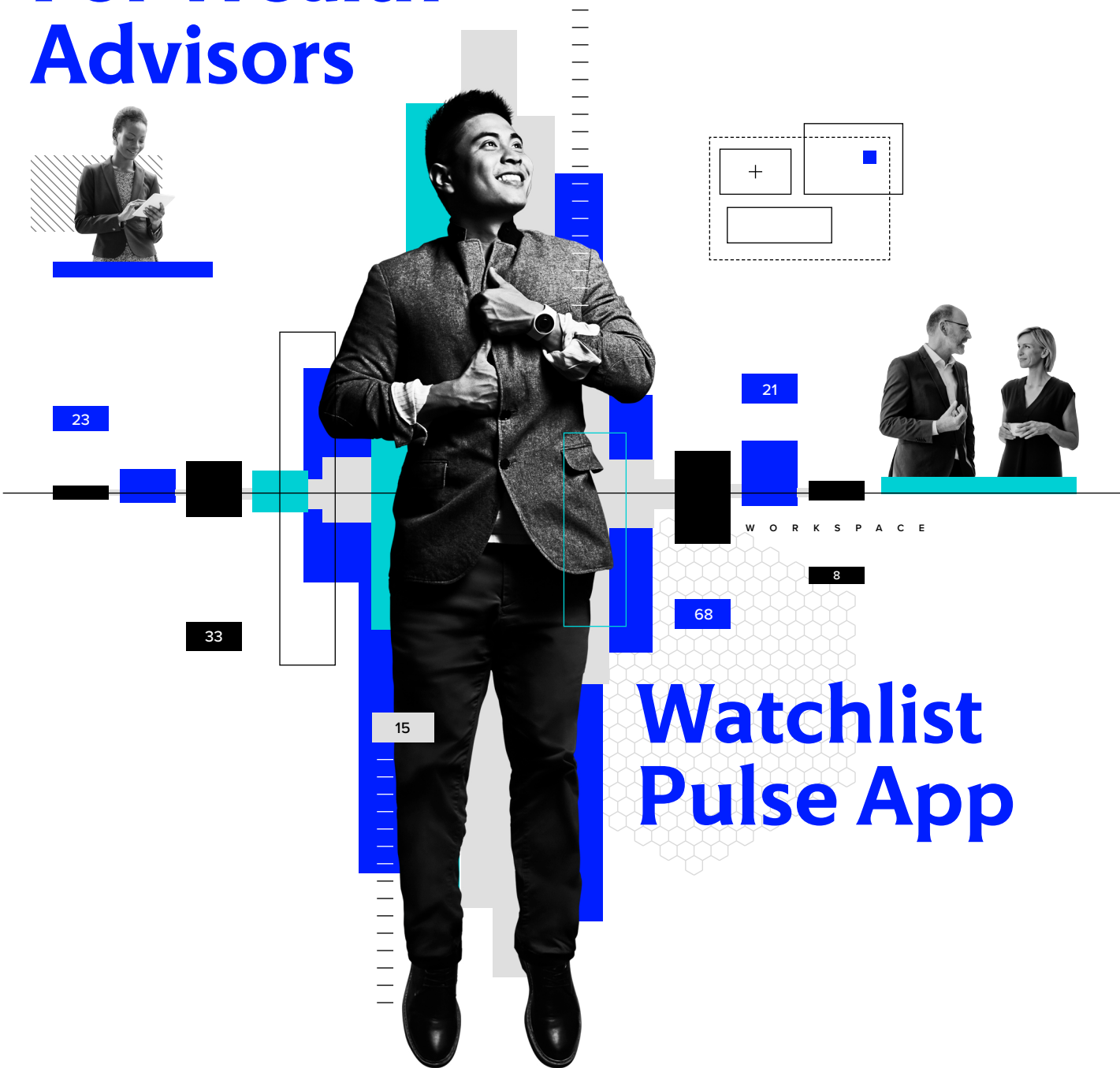


For Wealth Advisors



Watchlist Pulse App



1. Why should I use the app?

The Watchlist Pulse application allows you to monitor significant activity for critical data sets such as: Upcoming Events, LSEG StarMine® SmartEstimates® predicted surprises, StarMine quantitative model score movements, new broker research reports, new corporate filings and more for each company in your universe. Configurable user settings and intelligent analytics are used to ensure the most significant information is shown so you can focus quickly on what's important.

- 1 Select your universe (portfolio, Watchlist or index screen).

RIC	Activity	Financial Highlights	Predicted Surprises	Top Trending	News Sentiment	Events	Research	Filings	ARM	EQ	RV	IV	Val-Mo	Price Mo	CAM	Price Cha	Daily Limit Settings
PSN	+	1	2371	2	1	14			93	96	30	27	81	96	77	+1.53%	642,987
DYN	+	1	#70						7	6	25	21	5	51	19	+0.66%	1,366,267
NKE	+	1				1			32	88	15	15	11	89	42	+1.44%	391,901
AAN	+								13	79	89		58	11	58	+5.41%	584,480
EMN	+					1			62	89	84	86	87	31	96	+3.96%	94,557
KON	+							2	59	78	30	26	37	74	63	+1.74%	1,854,881
KCN	+							2	35	83	27	24	7	8	83	+1.70%	4,366,960
WRLD	+							1	18	18	53	8	8	18	4	+11.50%	6,375,338
APLD	+							1	65	95	72	27	50	53	54	+3.10%	18,024,178
AMZN	+							1	86	95	15	3	38	74	56	+0.95%	1,996,440
BAL	+	2							25	59	17		2	12	12	+5.11%	3,394,770
BBN	+					1			25	92	71	71	64	57	65	+2.92%	242,391
DOW	+					1			40	97	93	63	65	33	90	+4.33%	411,174
KRN	+							2	31	83	25	43	53	53		+3.20%	1,250,017
ATCO	+							1	86	82	57	60	97	96	100	+0.27%	11,866,748
LULU	+							1	37	90	15	5	13	79	79	+1.43%	550,750
LVS	+	1							30	85	54	39	24	38	50	+9.18%	550,065
PFE	+							1	80	53	56	72	81	44	89	+1.43%	1,555,609
VZ	+					3			74	80	89	57	50	88	89	+0.27%	1,280,522

- 2 Customise Watchlist Pulse: Configure the criteria that defines the data included on the Activity Summary Table.

CUSTOMIZE DATA ACTIVITY

DATA ACTIVITY CATEGORIES

- ☒ FINANCIAL HIGHLIGHTS
- ☒ ESTIMATE HIGHLIGHTS
- ☒ STARMINE MODEL SCORES
- ☒ NEWS, EVENTS AND FILINGS
- ☒ RESEARCH

NEWS SENTIMENT

- ☒ Include sentiment only when 'Very Positive'
- ☒ Include sentiment only when 'Very Negative'

EVENTS

- ☐ Indicate Activity when 1 or more events are posted for a company
 - ☒ Conference
 - ☒ Corporate Actions
 - ☒ Dividends
 - ☒ Earnings & Corporate
 - ☒ General
 - ☐ Institutional
 - ☐ Transactions

FILINGS

- ☐ Indicate Activity when 1 or more filings are posted for a company
 - ☒ Company Periodic Reports
 - ☒ Company Significant Event/Press Releases
 - ☐ Fixed Income Prospectus
 - ☐ General Prospectuses
 - ☒ Mergers Acquisitions

Save Cancel

- 3 Use the Data Column Management setting to select the columns to display within the data table. By default, the data table columns will match the data fields selected in the Customisation Tool. Columns can also be removed by hovering over the column name and selecting **Delete**.

PRICESMART INC.

RIC	Activity	Financial Highlights	Predicted Surprise	Top Trending	News Sentiment	Events	Research	Filings	ARM	EQ	RV	IV	Val-Mo	Price-Mo	CAM	Price Change	Volume
Total Activity			7		2	13	1	21			1	1					
+ PSMTO						2		3	78	40	42	38	76	50	47	+2.25%	77,996

EVENTS

Date	Event Name	Event Type	Date to
09-Apr-2020 12:00	Q2 2020 Pricesmart Inc Earnings Call	Earnings & Corporate	
08-Apr-2020 16:00	Q2 2020 Pricesmart Inc Earnings Release	Earnings & Corporate	

FILINGS

Received Date	Document Title	Category	Form Name
07-Apr-2020 17:29	PRICESMART INC-4	Ownership: Statements	4
07-Apr-2020 17:23	PRICESMART INC-4	Ownership: Statements	4
07-Apr-2020 16:06	PRICESMART INC-6-K	Company Significant Events/Press Releases	6-K

- 4 Schedule up to 10 daily emails of activity data using the Watchlist Pulse Email Alert functionality.

Watchlist Pulse

RIC	Activity	Financial Highlights	Predicted Surprise	Top Trending	News Sentiment	Events	Research	Filings	ARM	EQ	RV	IV	Val-Mo	Price-Mo	CAM	Price Change	Volume
Total Activity			7		1	14	1	22			1	1					
+ IELA						2			74	90	69	57	90	88	59	+1.20%	1,912,166
+ PSMTO						2		3	78	40	42	38	76	50	47	+3.02%	127,031
+ SPIN						2		3	53	76	36	51	55	84	66	+2.13%	130,586
+ AAPLO						1	1		65	95	22	27	50	93	64	+2.50%	25,666,358
+ USYN						1			25	52	71	71	64	57	65	+3.40%	25,337,070
+ CATN						1			26	52	50	55	33	54	63	+4.21%	486,802
+ DOWN						1			40	57	65	63	65	33	90	+8.31%	671,404
+ BARN			1			1			62	69	64	66	67	21	96	+5.20%	206,130
+ KDN						1		2	59	78	30	26	37	74	63	+2.97%	2,007,908
+ NKE.N			1			1		1	32	88	15	15	11	68	42	+1.64%	545,373
+ A.N						2		2	13	79	88		58	11	58	+4.27%	898,885
+ AMZN.O						1		1	85	95	15	3	38	74	56	+1.20%	3,088,500
+ B.N			2						25	59	17		2	12	12	+2.71%	4,880,520
+ E.N			1			2		2	12	26	93	96	75	40	56	+8.11%	3,081,080
+ HON.N						1			21	83	39	41	23	53	53	+2.84%	254,582
+ BNTX.O						1			96	82	57	60	97	96	100	+6.74%	18,482,338
+ LUSID						1		1	37	90	15	5	13	79	20	+0.78%	904,027
+ LUSN			1						30	85	54	35	24	38	50	+5.81%	832,687
+ MCLN						2		2	25	83	27	24	7	8	43	+0.90%	642,718
+ PFEN						1		1	80	53	56	72	81	44	89	+2.02%	2,820,213
+ PLN			1						53	95	30	27	45	90	77	+1.94%	1,171,813
+ WTHNO						1		1	15	18	53	8	6	18	4	+11.32%	9,212,966

2. Key facts

- Watchlist Pulse streamlines your workflow by pulling in the most significant information about each company in your universe over the last 24 hours into a single, intuitive interface.
- Each content set has a varying degree of configurability, allowing you to tailor the results to include only what's most important to your daily workflow.
- Watchlist Pulse is available on the LSEG Workspace desktop and LSEG Workspace Web.

Note: Access to content within this app may be limited due to your subscription to Workspace for Wealth Advisors.

3. Top tips for using the app

The Watchlist Pulse app also has a number of different list-based views, allowing you to further analyse the important information for the companies in your universe:

- **Constituents:** Create a tabular report by selecting the relevant data items and other various options. Reports can be saved, shared, exported to Excel® and downloaded as investor briefs – concise briefs on the most impactful news stories in your universe
- **Research:** Broker research with the ability to select time frame and research filters (i.e., initiation reports, M&A, etc.).
- **Events:** Past and upcoming events with the ability to select time frame, search by keyword and filter by specific event types (i.e., earnings and corporate, institutional, etc.).
- **Ownership:** Provides insight into relative levels of investment and helps identify which investors commonly hold (or don't hold) the companies in your universe.
- **Filings:** Access submitted filings and filter by filing category (i.e., security purchases, company periodic reports, etc.).
- **Scatterplot:** Graph up to three variables on each company in your portfolio/list across a scatterplot. Analyse the relationship between the three variables for each company in the list.

4. Need help?

You can contact us directly through your access to Workspace for Wealth Advisors.

Click on the question mark icon top right and submit your question via Get Support.



Access our blended learning [here](#) on the training site

[Visit the Workspace for Wealth Advisors page](#)