

LSEG Workspace

For Wealth Advisors Stock Reports Plus

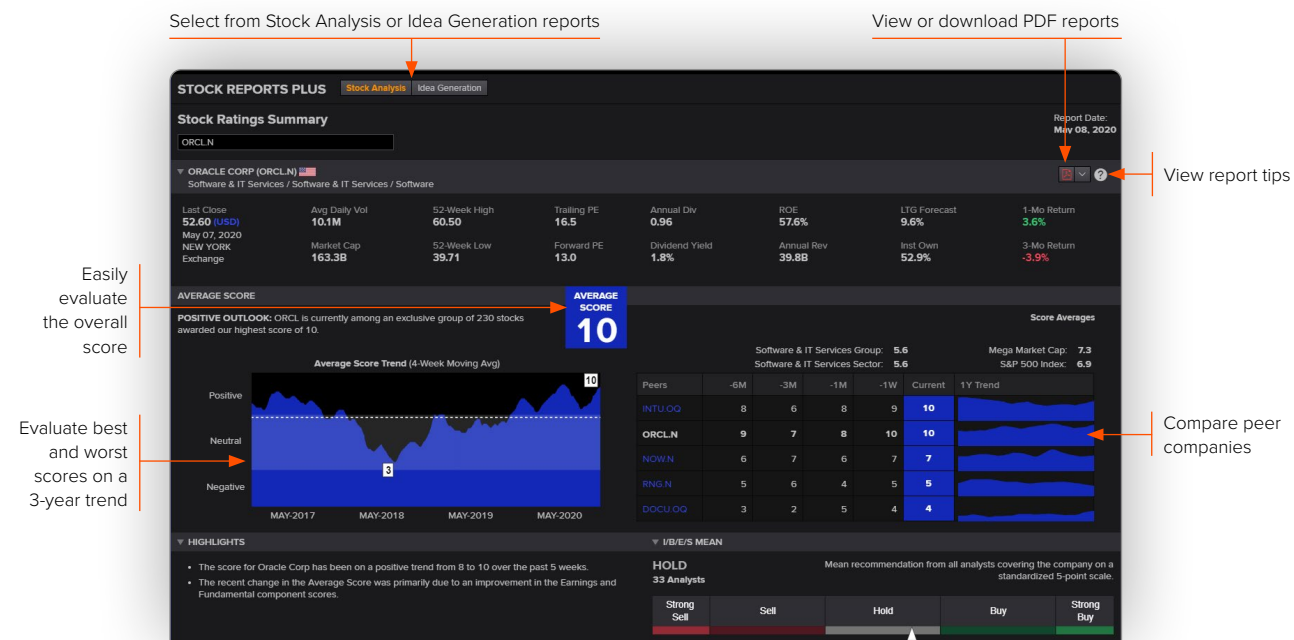


LSEG DATA &
ANALYTICS

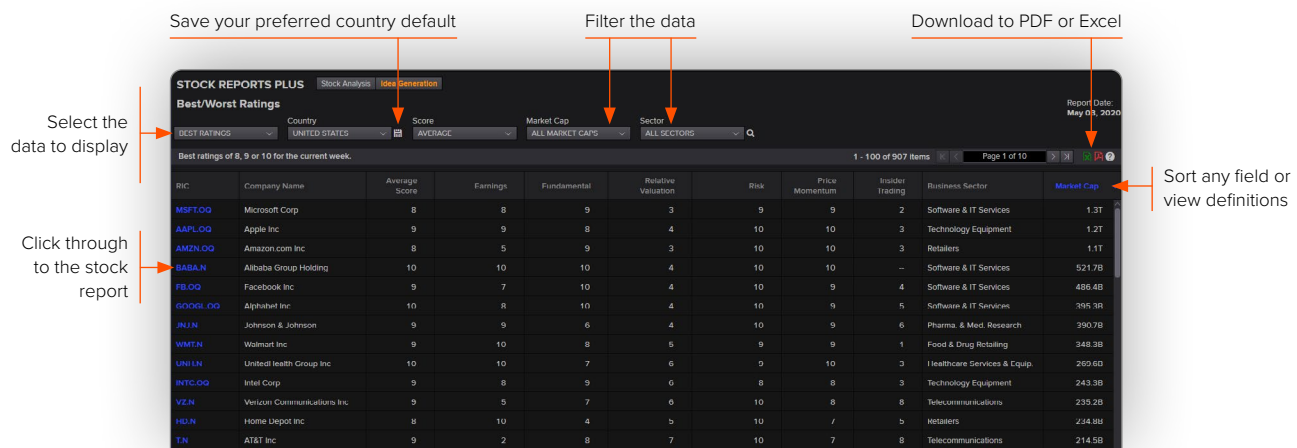
1. Why should I use the app?

The Stock Reports Plus app in Workspace uses a proven ratings system to optimize your stock selection process and to generate compelling investment ideas. Independent research reports provide time-saving research capabilities for various investment strategies and put the data into context with peer analysis, historical comparisons and text highlights. Component ratings identify meaningful trends in earnings, fundamentals, relative valuation, risk, price momentum and insider trading.

SRPLUS – Summary Report



SRPLUS – Idea Generation: Best/Worst Ratings

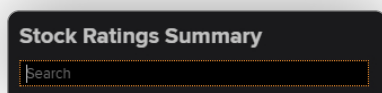


2. Key facts

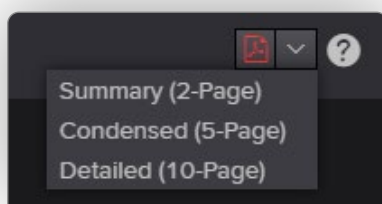
- Select from approximately 40,000 equities for analysis
- View ratings on a scale from 1 to 10 for the overall average score, component scores or the factors that make up each of the component scores
- Compare the company's ratings and financial metrics with sector-based peers
- Identify positive or negative score changes for the week, stocks with the best or worst ratings or stocks with positive scores and high dividend yields (bullish high yielders) from the Idea Generation menu
- Download PDF reports to save or share with clients
- Easily export Idea Generation data to Excel® for further review

3. Top tips on how to use the app

- To access the app, type **SRPLUS** in the Workspace search box and select the entry from the autosuggest options
- Enter a RIC symbol or company name in the Workspace search box or, to restrict the results to equities only, use the search box in the app



- Click on any blue RIC symbol in the peer sections or reports to view the data for that company
- Click on any blue field heading in the Stock Analysis reports to view a definition for the field
- View and download PDF reports. On the Stock Ratings Summary report, the drop-down list next to the PDF icon includes additional reports that are currently only available in PDF format. The Detailed Stock Report provides the most thorough analysis of each component score in Stock Reports Plus. The last two pages of the PDF reports provide tips that describe the Stock Reports Plus ratings methodology and calculations



- In the Idea Generation reports, hover over a field heading and click on the question mark icon that appears to view a definition of the field. Click on a field heading to sort the data in ascending order and click on the field heading again to sort the data in descending order

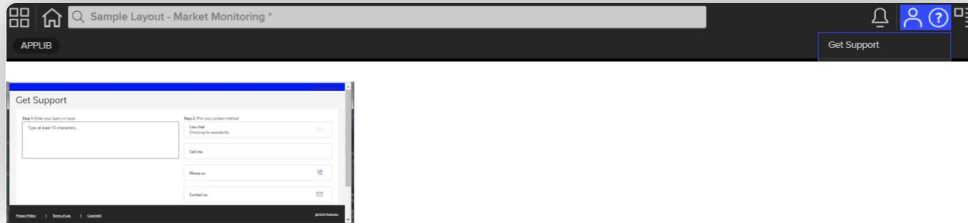
RIC	Company Name	Change	Current Average Score	Current Score Meaning
AX.N	Axos Financial Inc	+4	10	Positive
CNXN.OQ	PC Connection Inc	+3	10	Positive

- To choose a default country for the Idea Generation reports, select an option from the Country drop-down list and click the Save icon next to it
- Modify the settings in Workspace to choose your color preferences for the reports
- Use codes in the Workspace search bar to quickly access any of the reports
 - **SRPSUM**: Stock Analysis > Stock Ratings Summary
 - **SRPCOND**: Stock Analysis > Condensed Stock Report in PDF Format
 - **SRPDET**: Stock Analysis > Detailed Stock Report in PDF Format
 - **SRPCHG**: Idea Generation > Positive/Negative Changes
 - **SRPBEST**: Idea Generation > Best/Worst Ratings
 - **SRPBULLISH**: Idea Generation > Bullish High Yielders

4. Need help?

You can contact us directly through Workspace

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



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

Visit [our Workspace for Wealth Advisors page](#).