Why Refinitiv Workspace for Wealth Advisors

Refinitiv 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.

Market-leading content and trusted news
- News, events and commentary from Reuters and other news sources
- Valuation content and analytics
- Macroeconomic and market data
- Mutual funds and ETFs
- Alternative data (ESG, Private company data, among others)
- Pricing and reference data
- Ability to integrate and manage your own proprietary content

Flexible technology to help you scale
- A fast and light HTML 5 framework
- Intuitive navigation in a browser-like environment
- Intelligent search with improved relevancy and performance
- Native integration frameworks allowing the seamless integration of third-party applications
**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
-批准 conviction 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
Get a full overview of your client’s portfolio and performance

Align your portfolios with investment objectives and improve client satisfaction by creating customized reports and monitoring daily performance. Portfolio Analytics connects you to the right mix of news, macro-economic 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.

- Access global templates created by Refinitiv
- Access templates created by users within your firm
- Choose your portfolio from the Universe
- Export your summary to PDF or Excel

To access: type PORT into the search box
Find everything you need with intelligent search capabilities

The new Intelligent Search provides improved relevancy and performance with instant access to content in the search window. Results are tailored to the need of the user via intelligent autosuggest.

You can use search to find data or apps from the main Search Bar or the Launcher tool by pressing CTRL – Shift – Space.

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 onto the next parameter, once complete it will instantly perform the command
Stay on top of breaking news stories and events

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

- 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

To access Top News: type TOP into the search box
Keep up to date with the markets and what matters most to you

Monitor the market through the Watchlist Pulse App. Start here for a broad view on significant activity across your portfolio or watchlist 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.

Select your universe (portfolio, watchlist or index)

Access related information at a portfolio or index level

Create new templates or use existing ones

Add columns with key financial information you want to monitor, including fundamentals, estimates, StarMine and ESG metrics

Add multifactor ranking

Group your list country, sector or industry

Click on the cog to access user preferences

To access: type PULSE into the search box

Export to Excel®, PDF or a quote list
Visualize performance and analysis through advanced charting capabilities

A next generation charting platform contained in an easy to use interface. Visualize 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
- Add analysis, trend lines or event markers
- Export to Excel
- Look at the historical price change
- Reset your chart
- Save/Open charts
- View the data on a table
- We have now created a whole range of drawing tools to enhance, highlight and mark key performance milestones in charts.
- Access 100+ technical analysis options

Pin-to-scale – chart multiple instruments series with differing values, one to one, single axis. In the example to the right, all instruments have positioned to the same scale to view price performance more easily.

Add additional securities to show absolute price, rebase, performance or total return.

To access: type CHT into the search box
Get comprehensive country and region overviews

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

Monitor cross-asset financial indicators for your country of choice

Central Bank rates, top economic indicators, news and events

View economic events, polls and analysis

Compare key market data across different countries

Direct Links to relevant apps

Cross-market coverage for the chosen country or region

Key economic events

Top country news

To access: type a country name into the search box
Get a comprehensive overview of mutual funds and exchange traded funds

Funds Overview gives you access to Refinitiv’s Lipper Fund data with over 280,000 mutual funds, classifications & 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, Factsheets and Prospectuses.

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

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

View key benchmarks a fund is being tracked against

To access: type a fund name into the search box
Access comprehensive private and public company overviews

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

- Access 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 synchronize them with Microsoft Outlook®

To access: type a company name into the search box
Stay on top of economic events and forecasts

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.

Filter by date  Select your event types and market impact  Make sure you click the “update” button  Click to change to calendar view

Choose the countries/regions you wish to monitor  Add reminders to your calendar  Export to Excel®  Receive news on highlighted events
**View industry specific activity and information**

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

View key metrics for that industry, including aggregated KPI's, fundamental and valuation measures, and economic indicators

Toggle between suggested indices or add your own

See the top/bottom performers by % change or market cap

Never miss an up-and-coming event

To access: type **INDUS** into the search box
Access a customizable home page experience

Home is your personalized desktop, giving you an overview of everything that’s most important to you. Customize the apps and information you want to see on your home page to simplify your workflow and improve efficiency.

Key Apps relevant to your job role

- Personalize your Home screen to show up to 4 different apps, arranged to your preference

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

To access: click the HOME BUTTON in the top left corner
Fixed Income
Access to summary terms and conditions, real-time benchmark, evaluated pricing and corporate & 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, depos, central banking & interbank offered rates and FX swaps & 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)
**Alerting**
Get customized 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 the Refinitiv Workspace.

**Microsoft Office Functionality**
Refinitiv 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.

**Messenger**
Messenger is a secure and compliant business tool that ensures users are kept up to date with investment ideas, strategies and news. Build internal communities to share live data, charts and analytics.

**App Studio**
Refinitiv 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.
Contact Information

For help:
Click Support in Messenger

For training and information:
Access the Training App
Or contact your Refinitiv representative.