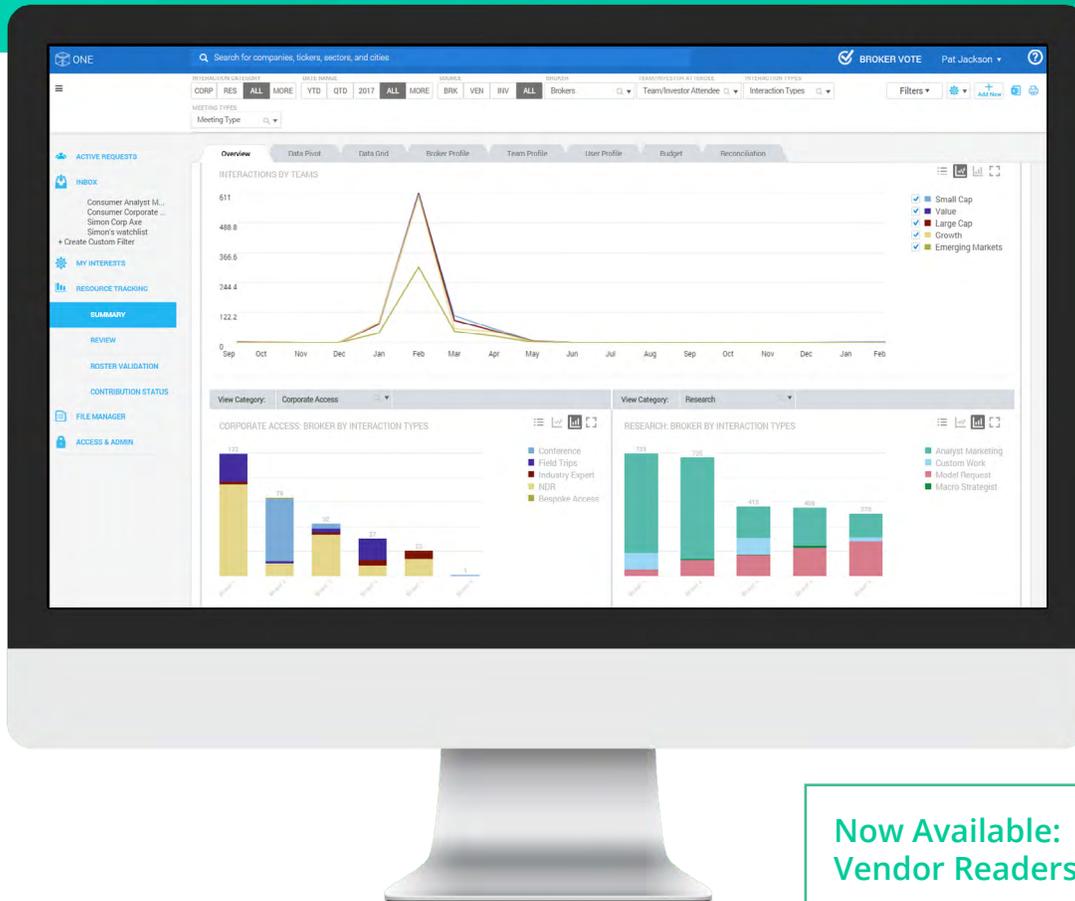


research valuation

Bringing greater transparency to the provider-client relationship

Your firm is unique and so are your relationships with the sell side. Empower your team with access to the most flexible set of applications for tracking, budgeting and valuing those relationships in the most granular way. Through customizable resource rate cards, calculators and provider evaluation processes, maintain MiFID II compliance and focus on delivering best-in-class service to your clients.



**Now Available:
Vendor Readership**

See a holistic picture of your research interactions by adding connectivity to vendor channels

Resource Tracking

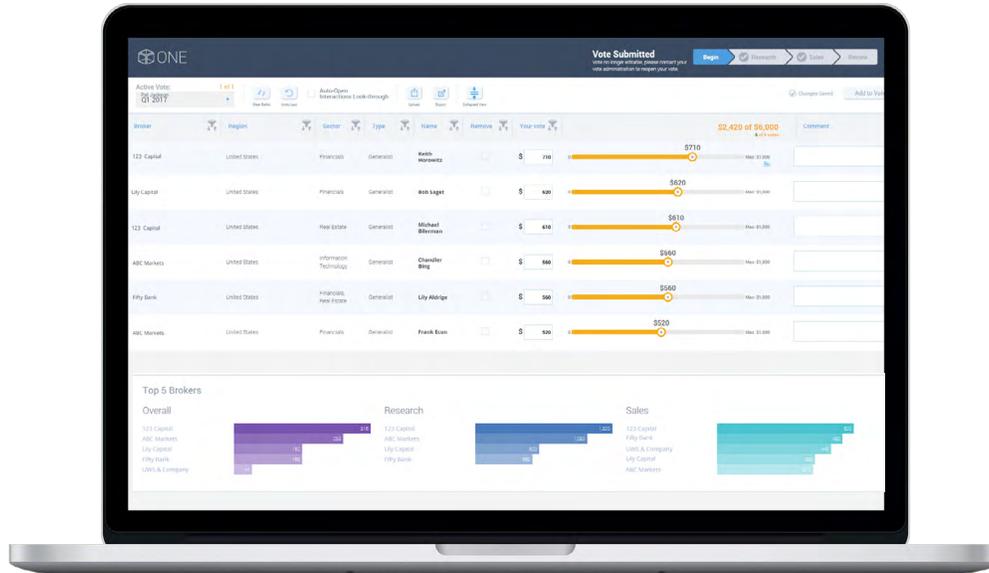
Manage your firm for continued MiFID II compliance with tracking and analysis tools for every research resource you consume, including vendor readership. With a flexible approach to setting rate cards and calculators, investment professionals can value interactions in the most relevant and meaningful way.

- Track and analyze all research resources consumed
- Create a unique methodology with industry-leading calculators and rate cards
- Receive consumption data directly from more than 450+ providers or capture it live via your email inbox using the Outlook Plug-In
- Action research payments based on the valuation framework set with seamless integrations into many RPA and CSA providers

Broker Vote

Streamline the way you evaluate research providers with a comprehensive framework that includes a quantitative review of your consumption data and a qualitative feedback process.

Enjoy the flexibility of setting up and managing your provider evaluation process with three options: standard, budget-based and multi-format voting



For illustrative purposes

Standard Vote

A pool of votes is set and investment professionals are able to vote on standard interaction types, such as corporate access events, research and sales

Budget-Based Vote

A distinct budget is set on a user-level and must be allocated to their provider relationships

Multi-Format Vote

A flexible system to run multiple votes at the same time and also customize the components that individuals can select

Budgeting

Strengthen the controls around allocating your research budget across your firm's teams and individuals. Account for both fixed and variable costs across time periods and providers to maintain compliance.



Customize the way teams and individuals can allocate research budgets across time periods and providers



Receive alerts when budget is over-allocated*

About Visible Alpha

Since Visible Alpha's commercial launch in February 2017, the company has been helping investment firms of all sizes and geographies discover ideas through its deep consensus platform and track and value research for MiFID II compliance. Visible Alpha creates a unified consumption and collaboration experience across research reports, analyst models and corporate access events and enables clients to discover, track, budget, value and pay for research content. Visible Alpha has a growing client base with \$16 trillion in AUM, more than 450 banks contributing content, and over 400 employees globally. The company is backed by some of the largest banks in the world.

* Available in H2 2018

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