Sentieo

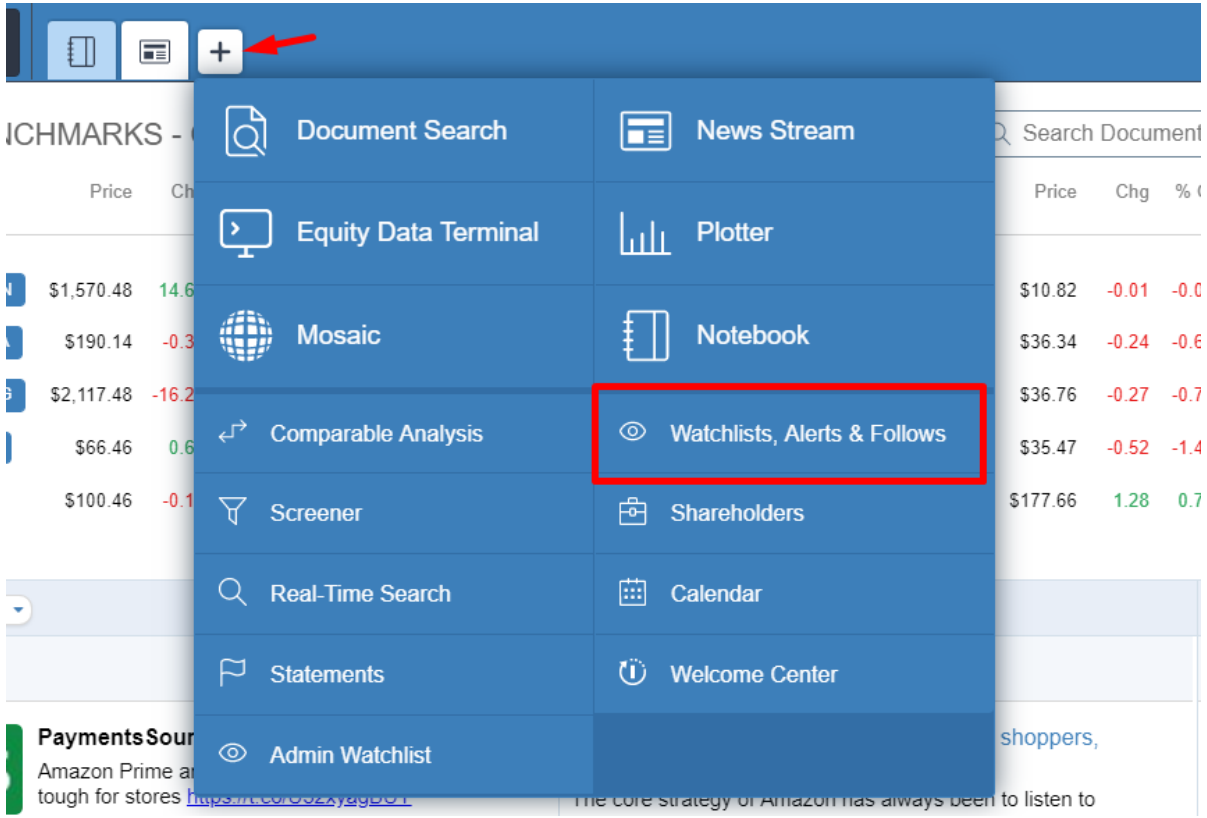
# Training Webinar:
# Saved Searches, Watchlists and Alerts

# Agenda

- How to best use our Watchlists & Alerts page
- Saved Searches in Doc Search
- How to opt-in to new Doc Search version
- Q&A

# Watchlists & Alerts

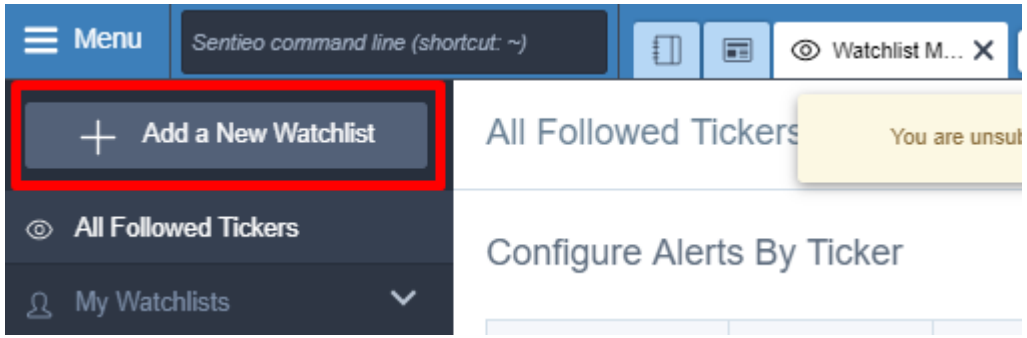
Click [ + ] to open up a new Watchlists, Alerts & Follows page.



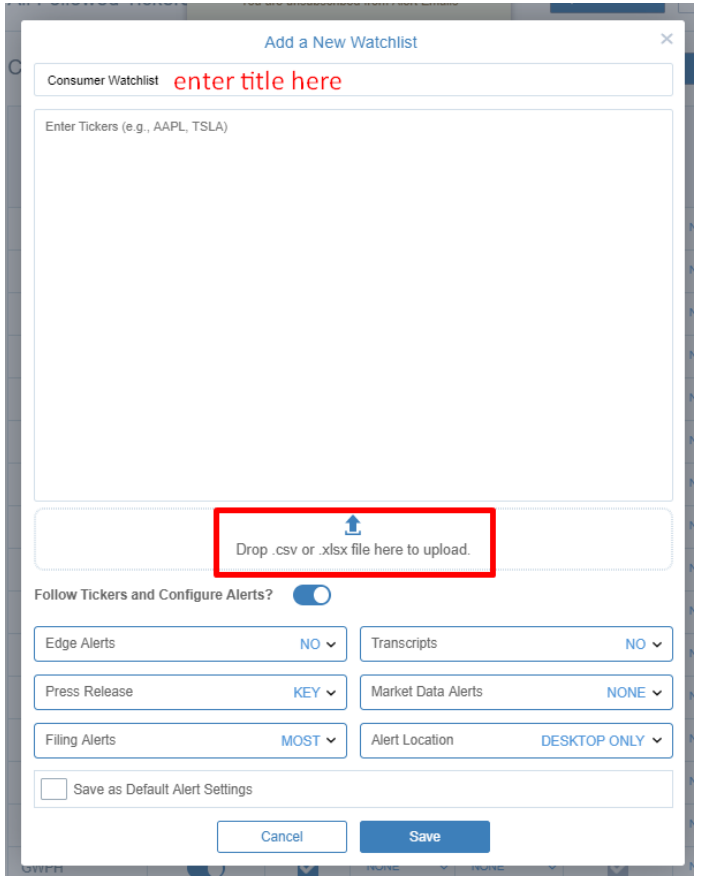
# Watchlists & Alerts

- Watchlists are a way to organize the stocks you track
- Useful because they are connected with the rest of the platform – can use watchlists in Doc Search, News Stream, Comparable Analysis, Calendar, etc.

1




2

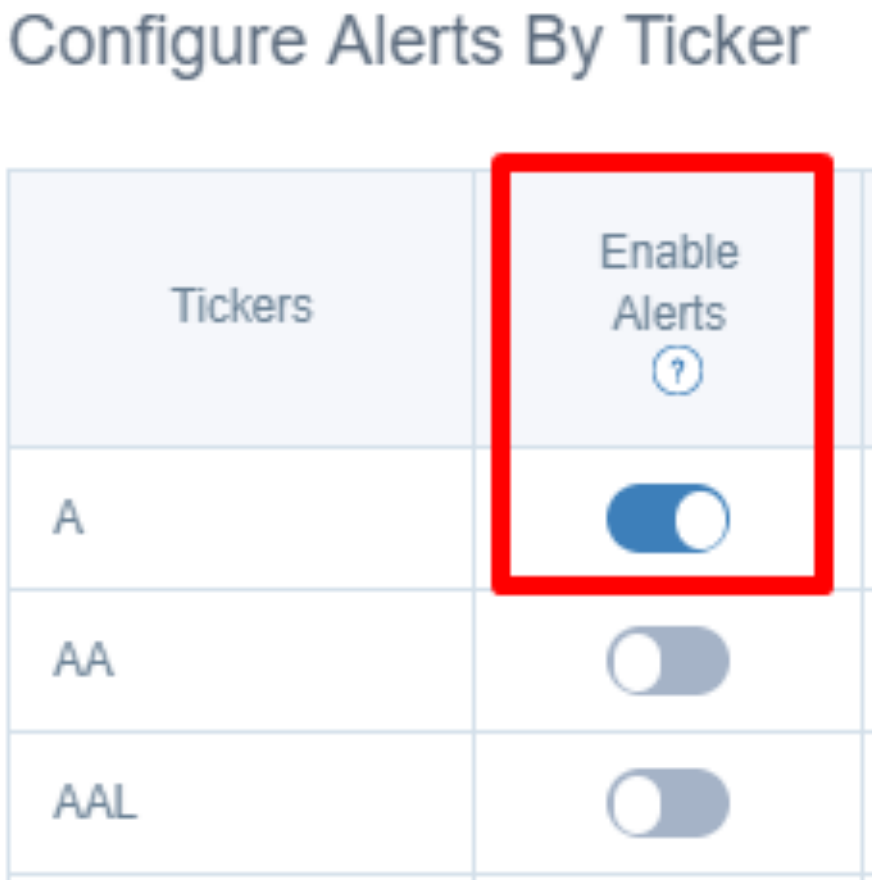



1) Click Add a New Watchlist
2) Type in tickers manually, upload via CSV or Excel file, or send your ticker list to your Customer Success Manager

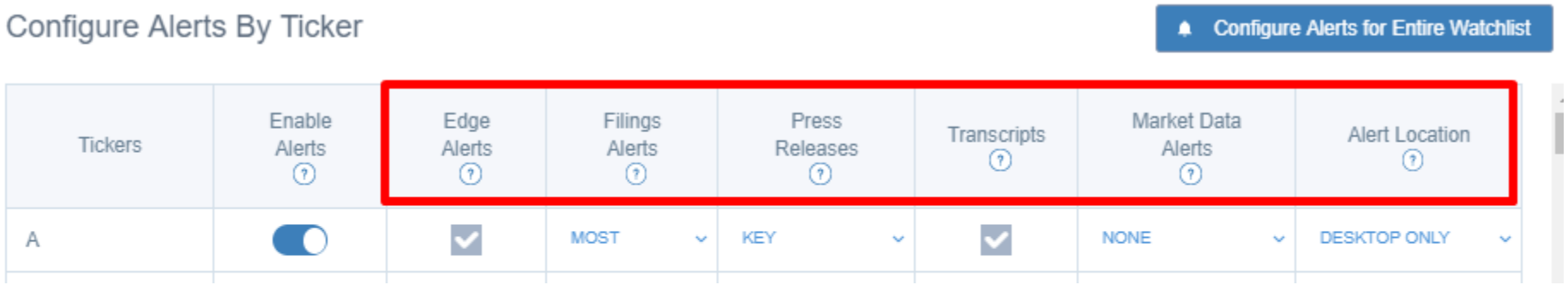
# Watchlists & Alerts

To set up alerts for a ticker, make sure the toggle in the **Enable Alerts** column is on (blue).

This will “follow” the ticker. Following tickers allows you to set up alerts for that ticker.



# Watchlists & Alerts




Alert Types

- **Edge Alerts**: pre/post-market email summary service
- **Filings Alerts**: SEC filing alerts (i.e. 8K, 10K, 10Q)
- **Press Releases**: receive alerts when press releases are received from newswires
- **Transcripts**: receive alerts when conference call transcripts are received
- **Market Data Alerts**: 52 week high/low or custom stock price movement alerts
- **Alert Location**: choose where to receive your alerts (email, desktop, mobile)

# Watchlists & Alerts

## Edge Email:

Sentieo

### Tuesday Pre-Market News

Pre-market news for the companies you follow on Sentieo.

**AMZN - Amazon Com Inc** 1555.86 +60.3(+4.03%)

Growing Number of Industries Harnessing the Power of Artificial Intelligence (AI) Technologies [LINK]
Tue 03.27.18 8:30 AM

Amazon Studios Greenlights a New Series, Cortes -- Steven Spielberg and Steven Zaillian Set to Executive Produce and Javier Bardem Set to Star and Executive Produce [LINK]
Mon 03.26.18 6:30 PM

**HMNY - Helios & Matheson Analytics Inc** 3.06 +0.09(+3.03%)

MoviePass(tm) and Landmark Theatres Sign Exhibitor Agreement [LINK]
Tue 03.27.18 9:03 AM

**TWMJF - Canopy Growth Corporation** 26.62 +0.72(+2.78%)

Cultivating the Cognac of Cannabis Strains [LINK]
Tue 03.27.18 8:30 AM

**TSLA - Tesla Inc** 304.18 +2.64(+0.88%)

China Wants in on the Clean, Copious, and Chilean Energy Boom [LINK]
Tue 03.27.18 8:30 AM

Thomas Thornton @TommyThornton
@SconnieTrader @eriz35 @ValueMule If you bought $TSLA in the past year to hold you haven't

## Filing Alert Email:

Sentieo

**ALERT - New SEC filing for $CELG**

**Celgene Corp /de/**
**$89.04** -0.29 (-0.32%) [08:01 AM EDT]



View in Sentieo

**CELG: 8-K Alert**

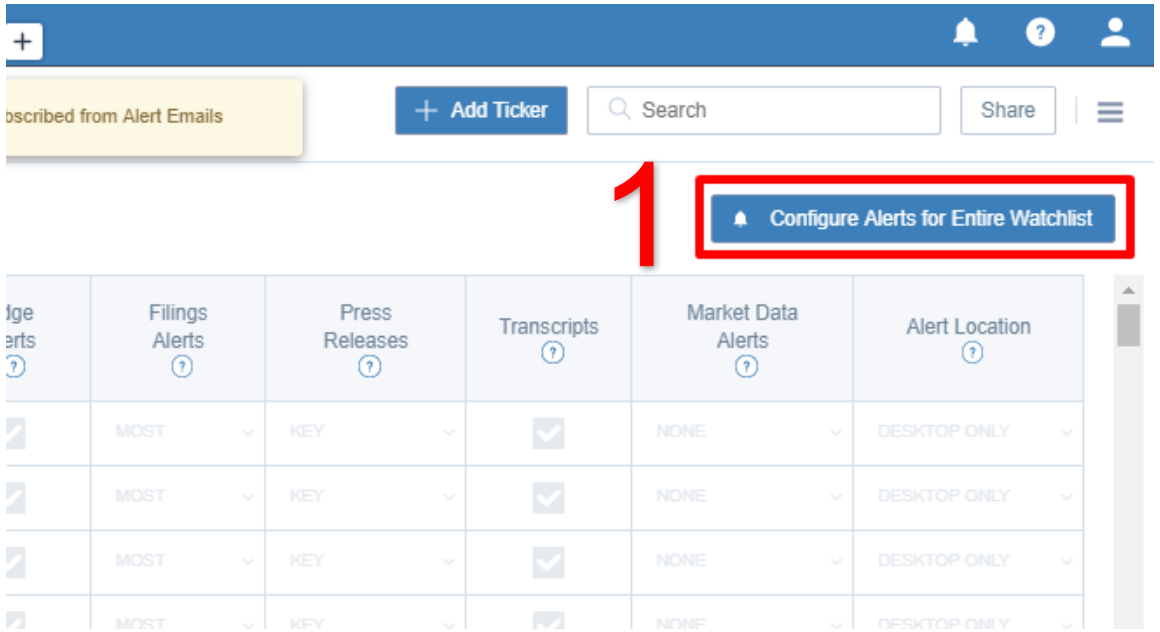
**UNITED STATES**
**SECURITIES AND EXCHANGE COMMISSION**
Washington, D.C. 20549

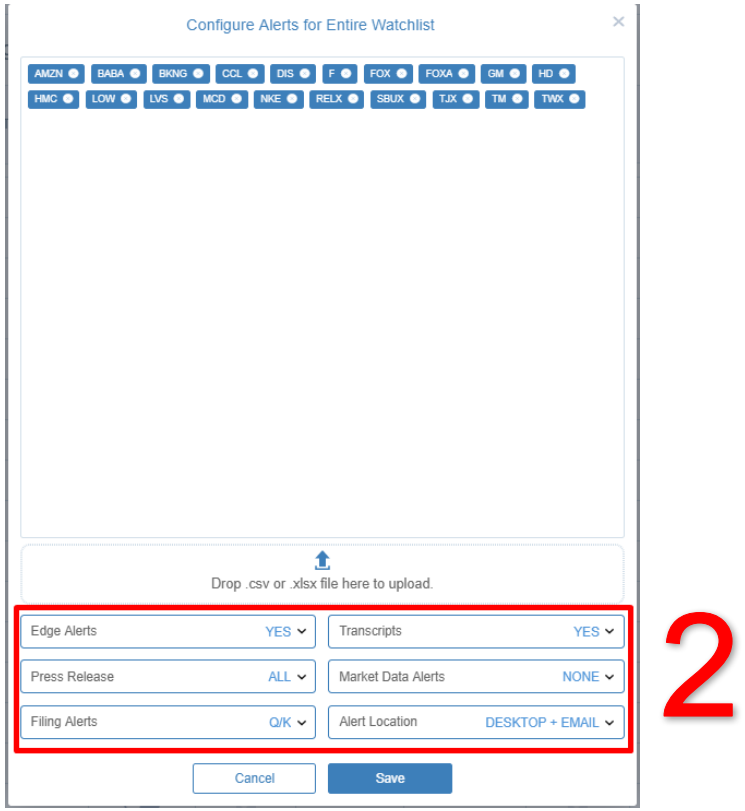
**FORM 8-K**

**CURRENT REPORT**
**Pursuant to Section 13 or 15(d)**
**of the Securities Exchange Act of 1934**

# Watchlists & Alerts

To bulk configure alerts for an entire watchlist, click **Configure Alerts for Entire Watchlist**



# Watchlists & Alerts

Tips & Tricks

- Desktop Alerts = bell icon
- Custom Filing Alerts
- Custom Stock Movement Alerts

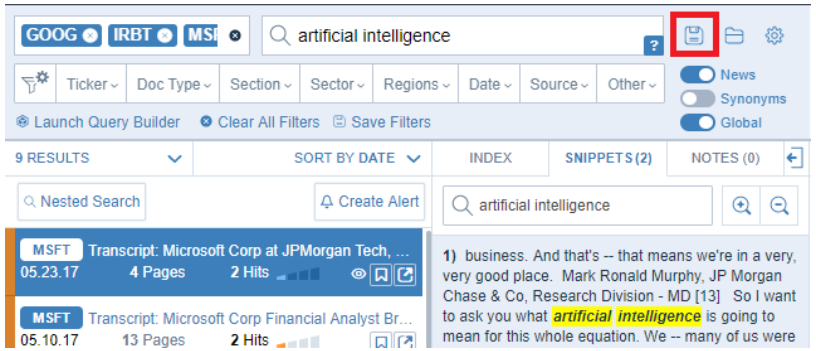
Places you can leverage your Watchlists

- Calendar
- Comparable Analysis
- Document Search

# Saved Searches

Uses

- Save your most used or frequent search queries for later use
- Setup alerts so that every time this search generates a new hit, you can be notified via email or desktop

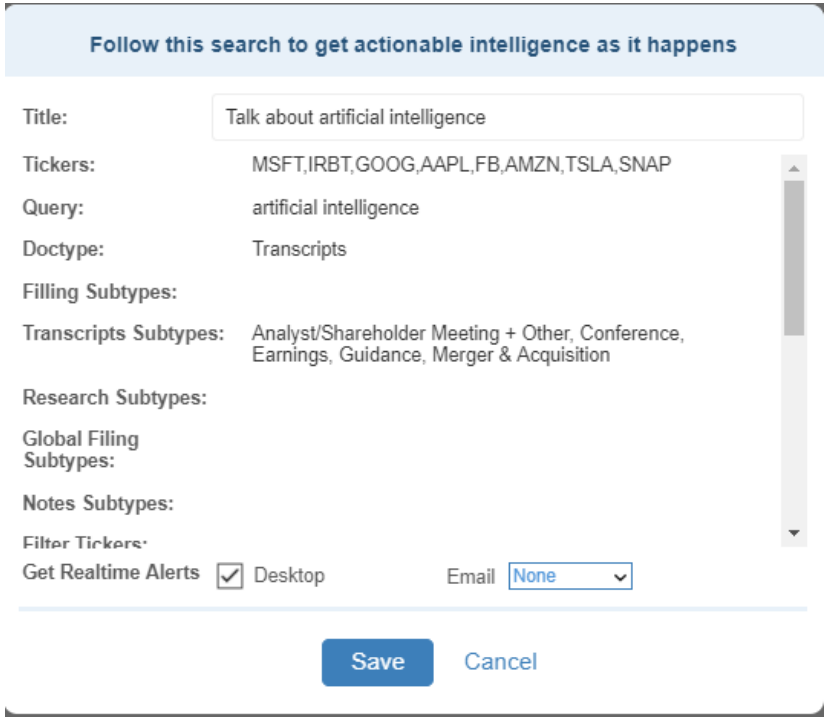



To save a search query and all of its parameters, click the **Floppy Disk icon** to the right of the query box.

# Saved Searches

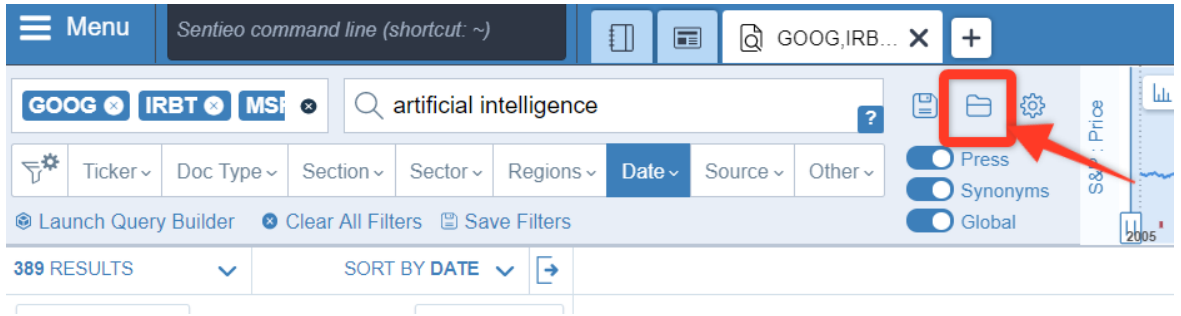
In the pop-up window, you can:

- Change the title of the Saved Search
- Select if you want to receive alerts via Desktop notifications
- Select if you want to receive email alerts
  - **Individual**: sends you an email every time your Saved Search generates a new hit
  - **Daily Digest**: sends you a daily summary of all hits generated that day
  - **Weekly Digest**: sends you a weekly summary of all hits generated that week *(new!)*

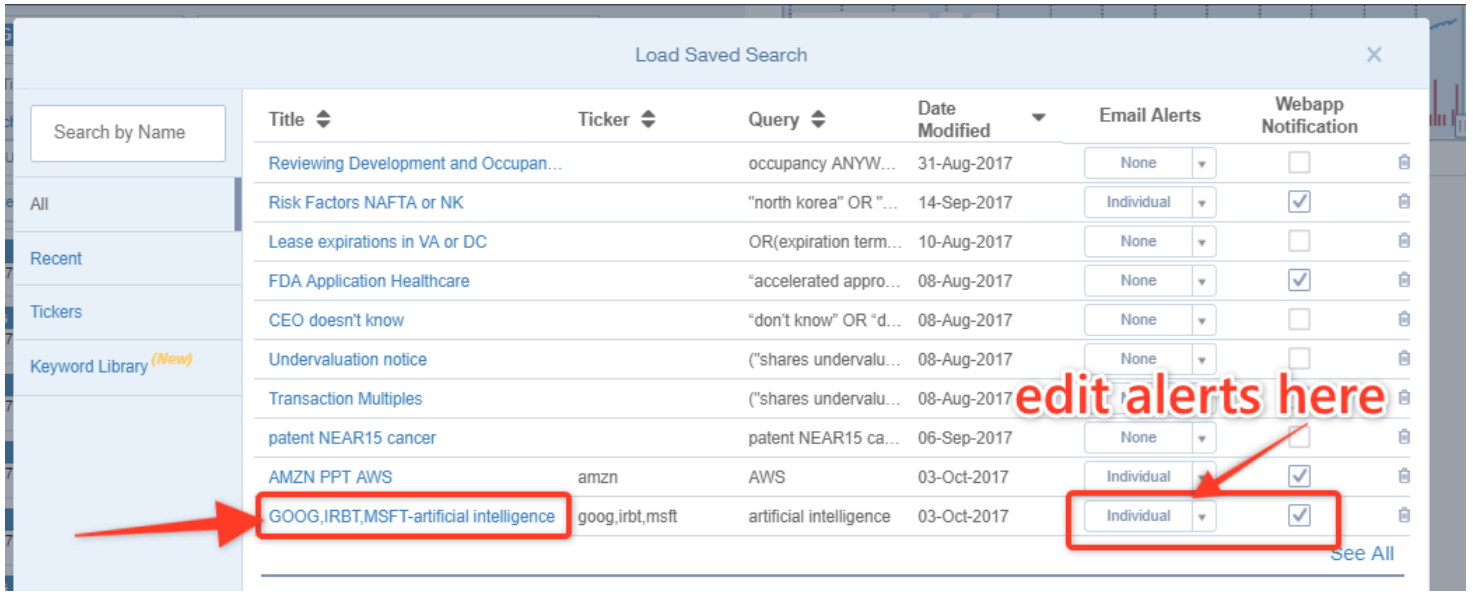


# Saved Searches

To access your previously saved searches, click the **Folder icon** next to the query box.

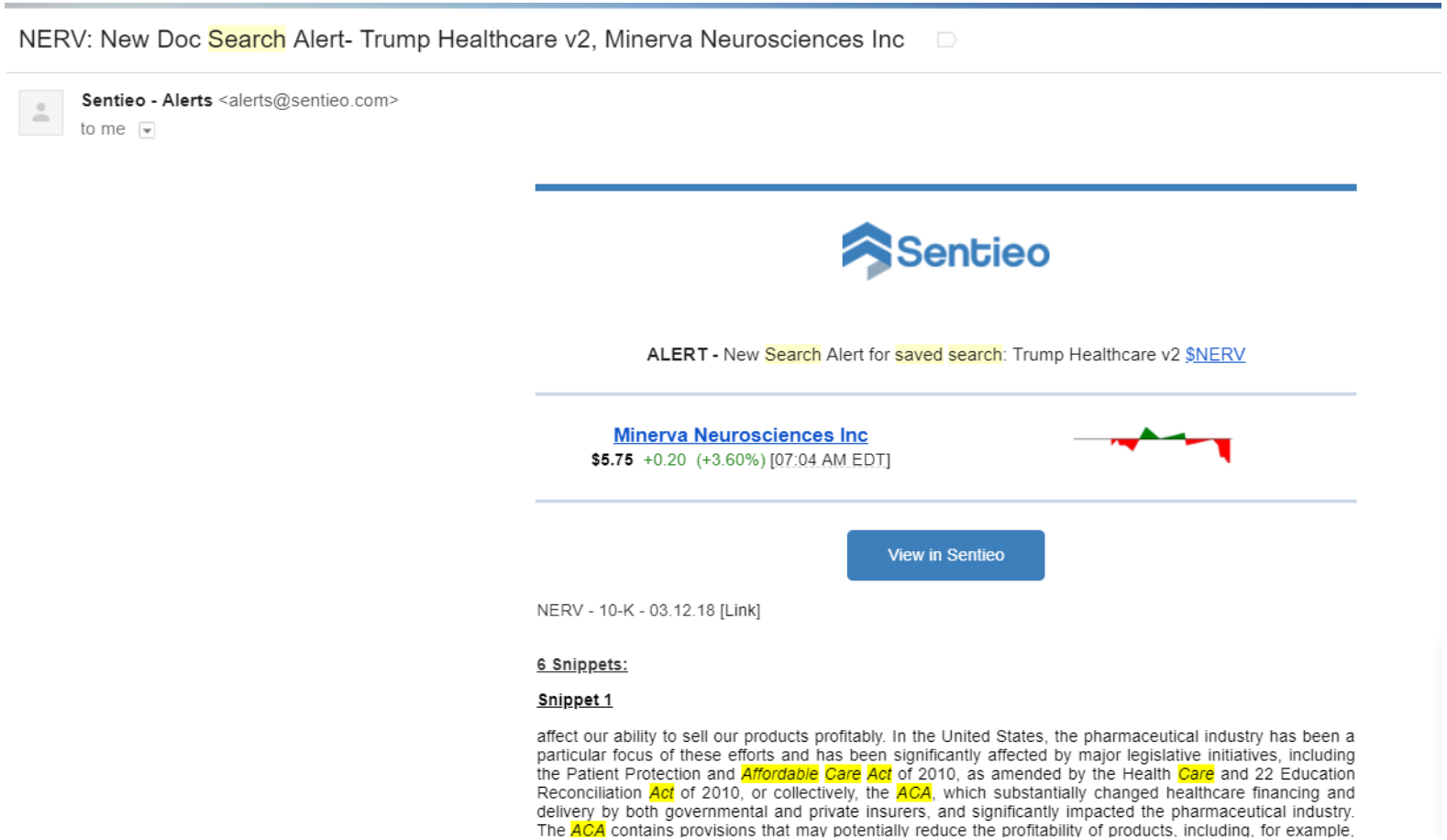



Click the Title of the Saved Search to run that search.



# Saved Searches

## Saved Search Email:



NERV: New Doc Search Alert- Trump Healthcare v2, Minerva Neurosciences Inc

**Sentieo - Alerts** <alerts@sentieo.com>
to me

Sentieo

**ALERT -** New Search Alert for saved search: Trump Healthcare v2 $NERV

**Minerva Neurosciences Inc**
**$5.75** +0.20 (+3.60%) [07:04 AM EDT]

View in Sentieo

NERV - 10-K - 03.12.18 [Link]

**6 Snippets:**

**Snippet 1**

affect our ability to sell our products profitably. In the United States, the pharmaceutical industry has been a particular focus of these efforts and has been significantly affected by major legislative initiatives, including the Patient Protection and *Affordable Care Act* of 2010, as amended by the Health *Care* and 22 Education Reconciliation *Act* of 2010, or collectively, the *ACA*, which substantially changed healthcare financing and delivery by both governmental and private insurers, and significantly impacted the pharmaceutical industry. The *ACA* contains provisions that may potentially reduce the profitability of products, including, for example,

# Saved Searches: Examples

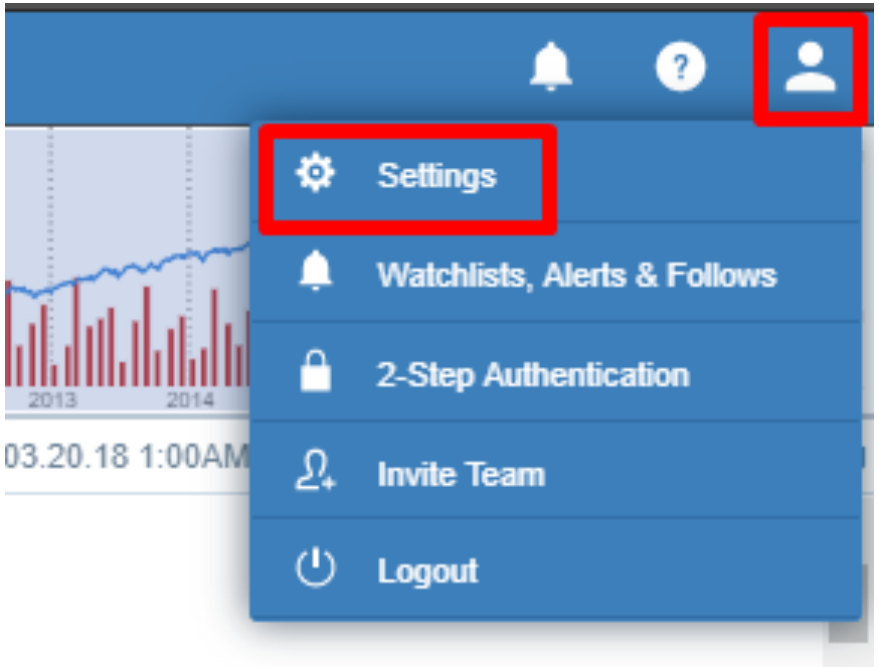
Cut in Dividend:

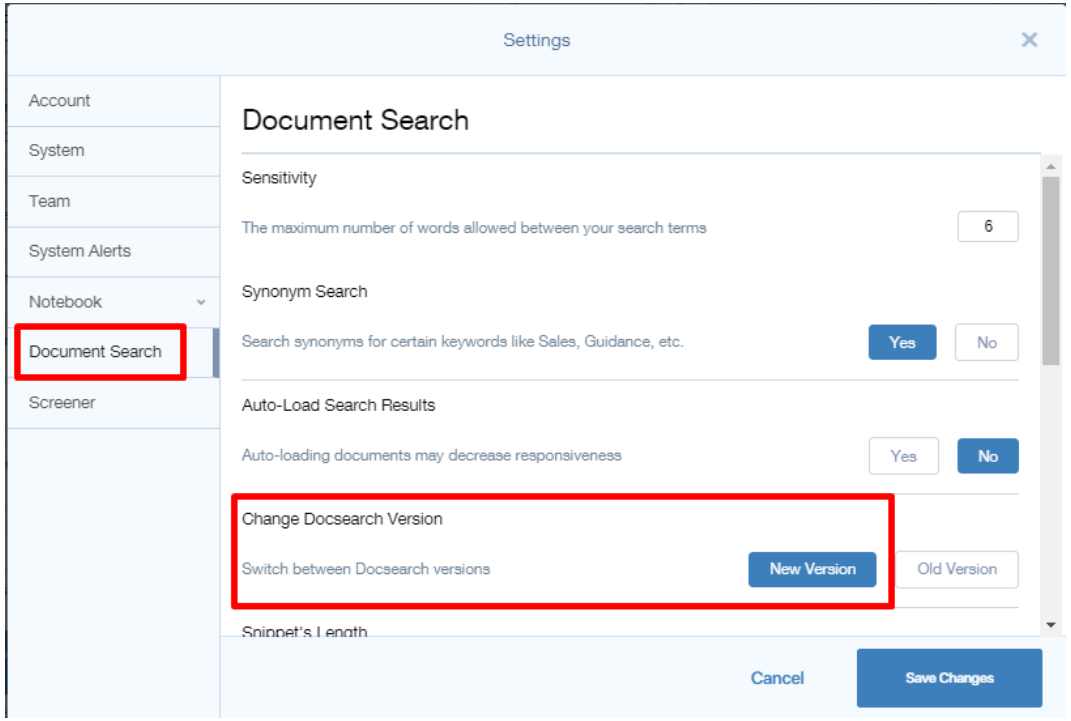
IN:TR in:Press ((OR("reduce" "reducing" "cut" "decreased" "decrease" "lower") NEAR3 dividend) FAR10 OR(divisor ((adjusted OR closing) NEAR4 "price") (tax BEFORE3 rate) "we may" (taxable BEFORE3 income) (cash BEFORE3 distributions) "cash flows from financing" "interest receivable" "ability to" "reduce debt" "not reducing" (interest BEFORE5 income) ((trade OR interest) BEFORE5 receivables) (stock BEFORE3 buyback) (debt BEFORE2 increase) (reduces BEFORE2 cost) (carrying BEFORE3 amount))) FAR0 OR(SNTO_TABLE "paid" "income" "received" "payable")

# New Document Search UI

We recently soft-released a new version of our Document Search. This new version is opt-in, and boasts a cleaner UI and a new Search Summary page to provide more insightful data on your searches.

How to opt-in:



# Reference guides

- Support Center - Watchlists & Alerts
- Support Center - Custom Filing Alerts
- Support Center - Custom Stock Movement Alerts
- Support Center - Saved Searches
- Ask us through Live Support chat!

# Q&A

Thank you!