



Insight at Every Data Point

Save 15 Minutes
Daily within
Your Investor
Relations Workflow

S&P Global
Market Intelligence

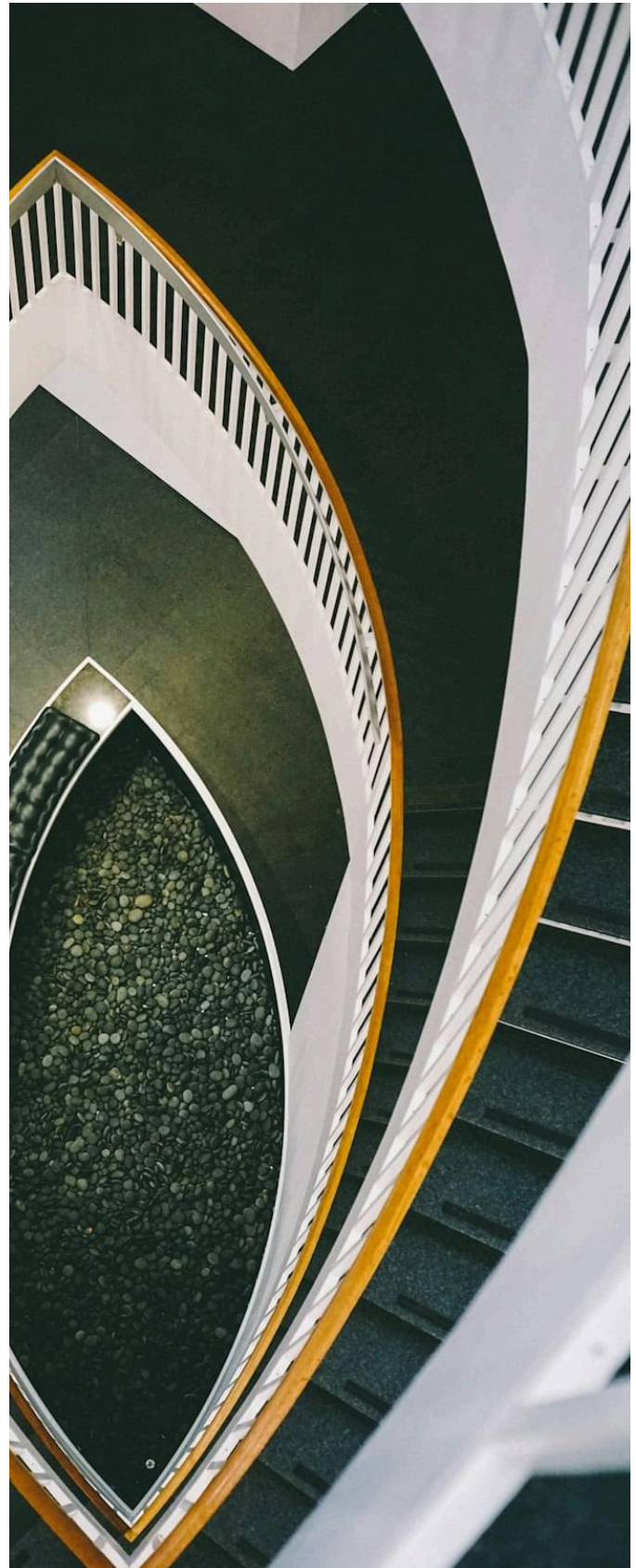
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To stay on-top of what's driving the market, investor relations professionals need transparent, high-quality data ready at their fingertips for effective investor communication.

Accelerated time to insight on stock movements, market drivers, ownership changes and investor sentiment is critical in helping companies drive growth.

We've identified the top demands on your Investor Relations workflow and addressed them with newly enhanced features on the S&P Capital IQ Pro platform. Our premier data solution puts a world of information at your fingertips and streamlines how you distill critical insights.



We help over 300,000 professionals do their jobs better with our platform solutions.

Whether you're looking to generate alpha, manage supply chain risk or meet regulatory requirements, our ecosystem of differentiated data, powerful AI solutions and dynamic visual analytics helps solve your everyday business challenges and empowers you to discover actionable insights faster.

Save time throughout your day

Investor Relations professionals are dealing with these top time challenges and manual processes.

Understanding Investor Sentiment

How can I understand and analyze earnings calls of peer companies without spending a lot of time listening in or reading through transcripts? I need to assess tone, call content about a company's performance, strategies communicated and how that resonated with investors.

Timesaver:

Read Transcript Summaries

- Utilize new generative AI transcript summarization to quickly glean the tone and mood of an earnings call or identify signals of management's optimism or challenges.
- Select and skim summaries organized by topic or sentiment type. Topics include financial results, company strategy, products and services, external factors and partnerships, while sentiments are categorized as positive or negative.

– Easily navigate to the source text used within the transcript summary, then share with colleagues for better collaboration or export to PDF or Microsoft Word.

Delivering Accurate Consensus Analysis

How can I better understand the Street's consensus on my stock when estimates sometimes include outliers and offer little transparency in their calculations, skewing the overall picture? I spend a lot of time adjusting and creating my own consensus analysis.

Timesaver:

Design a Custom Consensus View

– Refine your consensus calculations by applying a custom date window to data or removing specific brokers with very high or low estimates. You can also define a precise time window for analysis with a custom consensus that excludes revisions older than a particular date or number of days.

Staying Informed of Market Movements

I don't have a lot of time to spend tracking all the factors moving the market and my company's stock price. How can I feed essential insights into stakeholder communication, especially during crises, such as earnings misses, management changes, or market downturns?

Timesaver:

Read Curated Newsletters

- Instead of browsing and scrolling for news during high-pressure reporting times, save time by having intelligence delivered to your inbox.
- Users can subscribe to three daily newsletters to closely track the markets and key companies. We help curate Morning, Midday and Evening IQ newsletter publications to help busy professionals track critical market insights before the opening bell, through the day and as markets close.

Staying Ahead of Investor Activism

How can I identify activist interests early on so my company's executives can prepare for potential engagement through dialogue, defensive measures, or strategic adjustments to mitigate activists' influence?

Timesaver:

Analyze Activist Investor Ownership Data

- Quickly identify companies susceptible to an activist campaign using tech-forward tools and sort by tags such as Early Warning, Potential Targets, New Positions, and Increased Positions by activist investors.
- Understand activist objectives, past campaign successes and failures, and identify activist partners with our differentiated data.

Managing Reporting Quality and Consistency

As an investor relations officer, how can I ensure that all financial reports, presentations, and communications are accurate and consistent across multiple platforms and stakeholders without manually editing and checking data across documents?

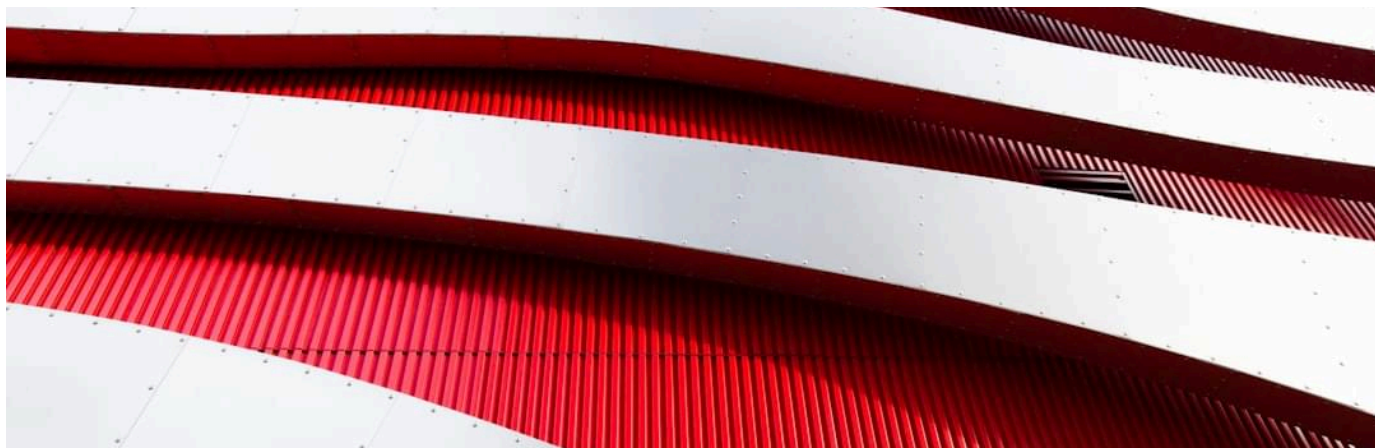
Timesavers:

Integrate Your Data with Microsoft Office Tools

- Use the best practice of having integrated data flowing through your Microsoft Office suite so that presentations, spreadsheets and reporting can be consistent.
- With the S&P Capital IQ Pro Office Plug-in, quickly pull data directly from our databases into a Microsoft Excel workbook. Use productivity tools that help you efficiently build, format and audit models, then link the results to PowerPoint or Word.

Simplify Your Data Sourcing

- Streamline how your team conducts analysis with centralized access to critical data and shared workflow features so you can confidently deliver insights under challenging time constraints.
- Reduce logins, broad googling, and time to gain insight with a single source and tech-forward analytics tools on S&P Capital IQ Pro.



Five Reasons to Love S&P Capital IQ Pro

- 1. Robust transactions data and private company coverage** that allow you to stay ahead with data on 1.2M+ M&As, 340K equity offerings, 330K debt offerings, 830K rounds of funding, 96K buybacks and 54M+ private firms worldwide.
- 2. AI-enhanced search, Chat IQ and Document Viewer** capabilities across our platform allowing you to quickly discover proprietary research, news and more.
- 3. Content personalization tools** like Dashboard, Alerts, News, Events Calendar, and Maps.
- 4. Tech-forward productivity tools** like our powerful Screener tool for targeted list generation and Microsoft Office Plug-in for modeling and template creation.
- 5. Machine Learning models** are applied to a vast library of documents, such as earnings call transcripts for summarization, identifying key phrases, and visualizing trending topics.

Try S&P Capital IQ Pro >

Takeaways

Meet market challenges head-on. Deliver clear insights to corporate stakeholders and investors with an expanded intelligence toolkit incorporating differentiated data, AI solutions and robust visual analytics.

- Rethink your workflow to understand investor sentiment. It doesn't have to be time-consuming or filled with dense transcripts and endless recordings. Leverage smart summarization and productivity tools integrated with your intelligence platform.
- Beware of skewed consensus analysis. Sharpen your calculations with custom criteria, so your team comes armed to the next board meeting.
- Break away from reactive engagements with investor activism. Utilize analytics and tools so you can proactively assess the market environment and spot red flags, allowing your team better planning and coordination.
- Data consistency and timely updates are critical. Resist manual data management and updates across key documents and investor reporting, which can lead to human error and miscommunication.
- Refine your approach to tracking market movements with productivity tools that help collect and refine the insights you need to stay informed.

Try S&P Capital IQ Pro >

About S&P Global Market Intelligence

We are the foremost provider of information services and solutions to global markets.

Data & Analytics: Fundamentals. Sector-specific KPIs. M&A. Credit risk. Supply chain. Sustainability. Our breadth and depth of data help you uncover new insights to make decisions with conviction.

Software & Platforms: Proprietary platforms. Leading-edge technology. Kensho AI innovation hub. With a keen eye on changing markets, we help you apply the power of innovation to financial decision-making.

Expert Insights: Analysts. Data scientists. Industry professionals. We know what you need to succeed in complex markets. We stand alongside you to solve business challenges.

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