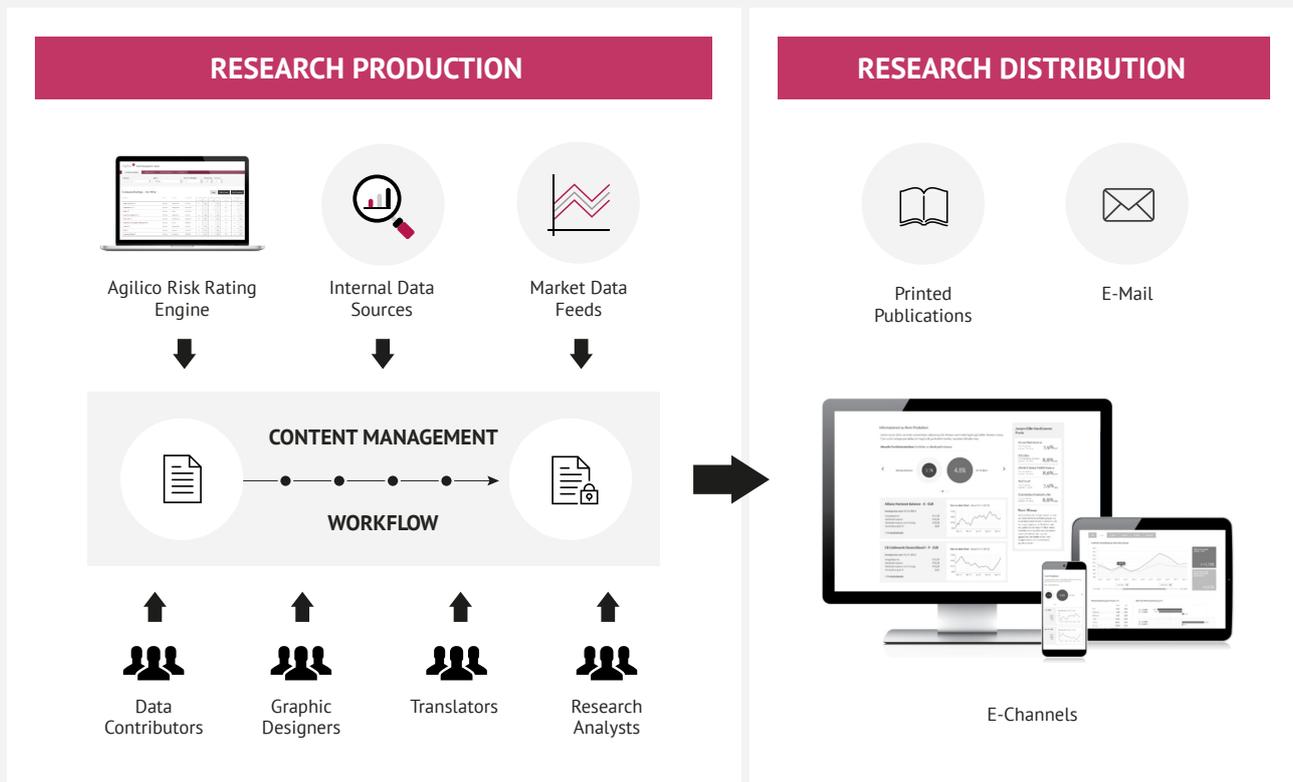


INVESTMENT RESEARCH AUTOMATION

Agilico's solution for investment research allows banks, wealth managers and independent research providers to address the industry's need to create modern research material effectively and efficiently, and to deliver it to the clients over their preferred channels.



Minimal time to market

Industrialised research production process ensures that a lot of repetitive and time consuming tasks such as version checks and comparisons, management of multi-lingual content and production of country-specific material are automated, which allows research professionals to concentrate on their core competences – delivery of the value proposition to the clients.

Online collaboration in research production

Creation of the qualitative research material is a teamwork that involves research analysts, text editors, graphic designers, translators, and legal and compliance professionals. Our solution orchestrates collaboration of all involved parties to achieve maximum value of the final product.

Customised workflows to ensure compliance with regulatory requirements

The solution ensures that the required checks and controls are in place by providing a workflow engine and a role-based authorisation model. Disclaimers are automatically generated based on country-specific rules.

Advanced templating

The templating engine enables the creation of professionally-designed deliverables containing charts, tables and rich-text content. Usage of Adobe InDesign format for print publications ensures a professional appearance to the research material.

Support for a range of data sources

The system allows usage of data in the research material from a range of different sources, such as market data feeds and internal applications, as well as the raw data available within Agilico's Risk Rating Engine. A range of connectors and intelligent data management avoids the need to track different versions of the same content, or make time-consuming checks and comparisons – the system ensures perfect tracking and logging of all content changes.

Omni channel delivery

Research material is distributed to the readers via their preferred electronic channels, such as web portal, mobile app or email, as well as via printed form.