

Outperform with insights that drive investment ideas, pinpoint sources of performance and identify risk exposures

Explore rich content from company fundamentals to ESG data combined with portfolio-driven alerting and analytics

Portfolio managers who are competing for AUM need to show they can consistently deliver outstanding risk-adjusted returns versus the benchmark. However, many portfolio managers face difficulties in executing strategies that outperform while staying on top of the latest market developments that impact their portfolios.

Refinitiv Workspace helps portfolio managers identify opportunities, balance exposure and risk, and keep well informed about their target companies and their supply chains. At Refinitiv, we offer an unrivalled breadth and depth of data – from company fundamentals and estimates to industry and macro data, StarMine analytics and ESG metrics.

Read timely news and event alerts that impact your portfolio

Filtering out the noise and quickly understanding what news and announcements are relevant to your portfolios is crucial. With Workspace, portfolio managers can experience timely alerts and insights, ensuring you don't miss anything important.

- Stay on top of company and macro developments with breaking news from Reuters – exclusively available to the financial community through Refinitiv – plus 10,000+ relevant news sources
- Receive alerts on your mobile devices to track any changes that may impact your investment thesis
- Assess everything from news and research to quantitative factors with a customised, single view of all the activity you care about in your portfolio. You'll save time and remain confident that you're up to speed with Watchlist Pulse
- Monitor developing trends as soon as companies report with our Earnings Season app
- Access real-time pricing for a broad range of credit products, including exclusive access to pricing from MarketAxess's corporate bond trading platform. View executable treasuries and rates pricing from Tradeweb plus intraday credit-default swap (CDS) pricing from Markit

Company Name	Activity	Financ... Highli...	Filings	Resea...	Rec Change	Predic... Surprise	Bold Estima...	Events	News Senti...	CAM	ARM	EQ	RV	IV	CCR	Price Change
Total Activity		35	19	3	11	373	74	109	49		41	6	5	3	2	
▶ COMMUNITY HEALTH SYSTEMS I...			2			6	1			88	98	51	44	93	7	-12.45%
▶ INVESCO MORTGAGE CAPITAL INC			1							36	80	14	88		3	-1.65%
▶ CHIMERA INVESTMENT CORP						3				78	38	84	98		9	+1.25%
▶ ARBOR REALTY TRUST INC									↑	60	36	13	97		9	+3.59%
▼ BRADY CORP					1	2			↑	47	34	44	58	48	98	-4.79%

Activity Summary | News | Research | Internal Research | Financial Highlights | Events | Filings

Over the last 24 hours the following activities have been triggered for BRADY CORP:

SIGNIFICANT STARMINE MODEL SCORE CHANGES

- The Price Momentum (Price Mo) score has **increased** from 6 to 18

RECOMMENDATION CHANGES

- McGinn, Michael (★★★★★ BRC.N / ★★★★★ overall) of WELLS FARGO SECURITIES, LLC has **downgraded** from 2 (OVERWEIGHT) to 3 (EQUAL WEIGHT)

NEW SIGNIFICANT PREDICTED SURPRISES

- The EBITDA SmartEstimate of \$ 210.20 M has decreased to **2.04% below** the mean estimate of \$ 214.59 M for the Jul-2022 fiscal year
- The EPS Reported SmartEstimate of \$ 0.76 has decreased to **1.96% below** the mean estimate of \$ 0.77 for the Apr-2022 fiscal quarter

NEWS SENTIMENT

- Very Positive News Sentiment

▶ TRUPANION INC					1					1	17	10	9		57	+2.37%
▶ APPIAN CORP					3					4	15	40	7		39	+12.93%
▶ TELEPHONE AND DATA SYSTEMS ...			2		2					52	32	15	84	88	20	-9.66%
▶ TRINITY INDUSTRIES INC			1		6					44	23	32	79		14	-0.20%
▶ COEUR MINING INC					1	2	1			16	2	7	62		6	-5.31%
▶ FOCUS FINANCIAL PARTNERS INC										42	92	19	51	66	40	-1.82%
▶ GREEN PLAINS INC						2				7	16	38	42	22	11	-0.70%
▶ JFROG LTD										11	74	14	10		77	-4.69%
▶ MATEPCON CORP										31	43	15	33	36	78	-1.71%

Filter out the noise with a consolidated single view of activity relevant to your portfolio.

Quickly evaluate your analyst team’s new ideas

Workspace enables your analysts to develop a non-consensus view quickly – from idea generation to opportunity analysis and modelling. Assess your analysts’ investment ideas or generate other ideas for them to investigate with the help of our macroeconomic and company data, differentiated analytics and screeners.

- Surface key trends and inflection points with Datastream’s biweekly News in Charts for topical and insightful macro charts
- Challenge the market consensus with StarMine proprietary predictive analytics, including, SmartEstimates®, Bold Estimates, analysts’ revisions as well as intrinsic and relative valuation models
- Discover insights, risks and ideas quickly with keyword and conceptual searches across news, transcripts, filings and sell-side research
- Review industry KPIs and macro factors that affect companies of interest – across margins, sales numbers and supply inputs to inflation, unemployment, commodity prices and consumer sentiment
- Explore key inputs and assumptions for your investment thesis with Datastream’s comprehensive data and visualisations – with 120 years of data and 40m+ instruments or indicators including 16.5 million economic indicators, I/B/E/S Estimate Aggregates, and Worldscope Fundamentals
- Leverage our proprietary StarMine equity risk premium, WACC and discount probability models to increase the accuracy of discounting investment risk in your valuation process
- Compare your forecast against the market consensus and do valuations of comparable same-sector companies with instant access to their financial performance measures and valuation metrics (e.g. EPS, cashflow)

Integrate ESG systematically into the investment process

Integrating ESG data into the investment management process is critical to winning mandates as well as improving investment outcomes. Workspace is a holistic solution for ESG to help build portfolios that meet investor mandates, uncover ESG-related risk and report on any aspect of a portfolio's ESG profile, such as climate.

- Uncover trends with Country SDG Scores that measure a country's relative performance across each of the United Nations' 17 Sustainable Development Goals
- Build sustainability systematically into your existing investment process with ESG data comingled with and mapped to core financial data
- Deconstruct a company's ESG score to manage risk and improve investment outcomes with over 400 data points and 70 analytics – backed by auditability back to source documents – covering 80% of global market cap.
- Portfolio Analytics enables you to aggregate and report ESG metrics for your portfolio, including attribution reporting to test how an ESG tilt is helping or hurting performance
- Address regulatory and investor demands for ESG disclosure and reporting with a Sustainable Finance Disclosure Regulation (SFDR) template for portfolio-level aggregation as well as a Carbon Intensity template in our Portfolio Analytics app

Give immediate insight into portfolio performance, attribution and risk

With Portfolio Analytics in Workspace, you can fully understand portfolio performance and risk for multi-asset class portfolios, including market-leading RiskMetrics and Barra Optimizer from MSCI.

- Analyse multi-asset class portfolios including cross-asset attribution, contribution, performance and style analysis
- Better understand a portfolio's performance by identifying primary drivers of absolute and relative performance at sector and security levels
- Monitor and report risk for multi-asset class portfolios. MSCI's RiskMetrics provides risk analytics including parametric, historical simulation and Monte Carlo Value-at-Risk methodologies, as well as market exposure and sensitivity analysis
- Stress-test portfolios to assess the potential impact of economic scenarios with MSCI's RiskMetrics – including historical and custom scenarios calibrated for shocks in equity markets, currencies, commodities and interest rates
- Optimise portfolios to reduce tracking error and minimise risk with MSCI's Barra Optimizer – supporting factor hedging, index tracking, stock selection and asset allocation.



Stress test portfolios to assess the potential impact of historical or custom scenarios.

About Refinitiv Workspace

Refinitiv Workspace gives you access to the broadest and deepest coverage of financial data, news, analytics and productivity tools – all in a highly customised experience on desktop, web and mobile.

Refinitiv Workspace for Analysts and Portfolio Managers has been designed to improve productivity at every step of the portfolio manager workflow.

We have built a smart, real-time financial market search facility that returns highly relevant results with minimal input. Our artificial intelligence algorithms become smarter the more you use them, learning your usage patterns to generate the right results.

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Refinitiv, an LSEG (London Stock Exchange Group) business, is one of the world's largest providers of financial markets data and infrastructure. With \$6.25 billion in revenue, over 40,000 customers and 400,000 end users across 190 countries, Refinitiv is powering participants across the global financial marketplace. We provide information, insights and technology that enable customers to execute critical investing, trading and risk decisions with confidence. By combining a unique open platform with best-in-class data and expertise, we connect people to choice and opportunity – driving performance, innovation and growth for our customers and partners.