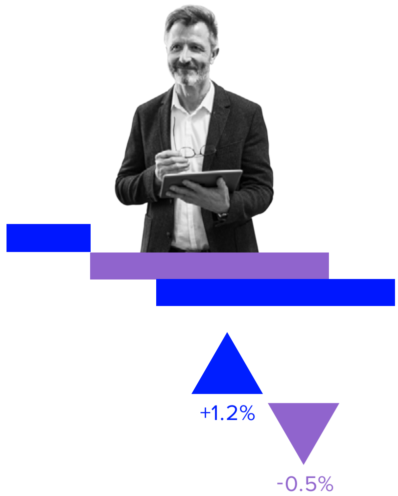
REFINITIV®
WORKSPACE
WEALTH ADVISORS



HOUSE VIEWS AND MARKET INSIGHTS

Securely integrate proprietary investment information, market data and news to improve in-house collaboration and efficiently distribute content, streamlining the advisor workflow.

An LSEG Business

REFINITIV®

STREAMLINE THE DISTRIBUTION OF IN-HOUSE AND EXTERNAL RESEARCH, CONVICTIONS LISTS, AND MODEL PORTFOLIOS

With research reports, convictions lists, and model portfolios distributed via multiple channels, there is often poor adoption of internal recommendations and suitability guidelines. Productivity and efficiency are also impacted as advisors lose considerable time searching for the latest proprietary information.

Our House Views and Market Insights capability provides a secure content management and distribution channel integrating proprietary investment information with market data and news to streamline the investment recommendation workflow.

Securely manage and efficiently share proprietary investment information

House Views and Market Insights provides workflows and screens to connect the different in-house teams involved in the creation, distribution and consumption of internal content. Administrators can set up and appropriately permission different types of users to be able to access, create or approve content in House Views and Market Insights. The system incorporates maker/checker functionality to enforce internal compliance rules.

House Views and Market Insights can link to multiple documentation and data sources, for example an advisor could access conviction lists, market data, research notes and in-house risk ratings which are hosted in the House Views and Market Insights database.

Users can also enter Reference/Model Portfolios based on securities that have been added as a conviction, or upload one or more portfolios from Excel.

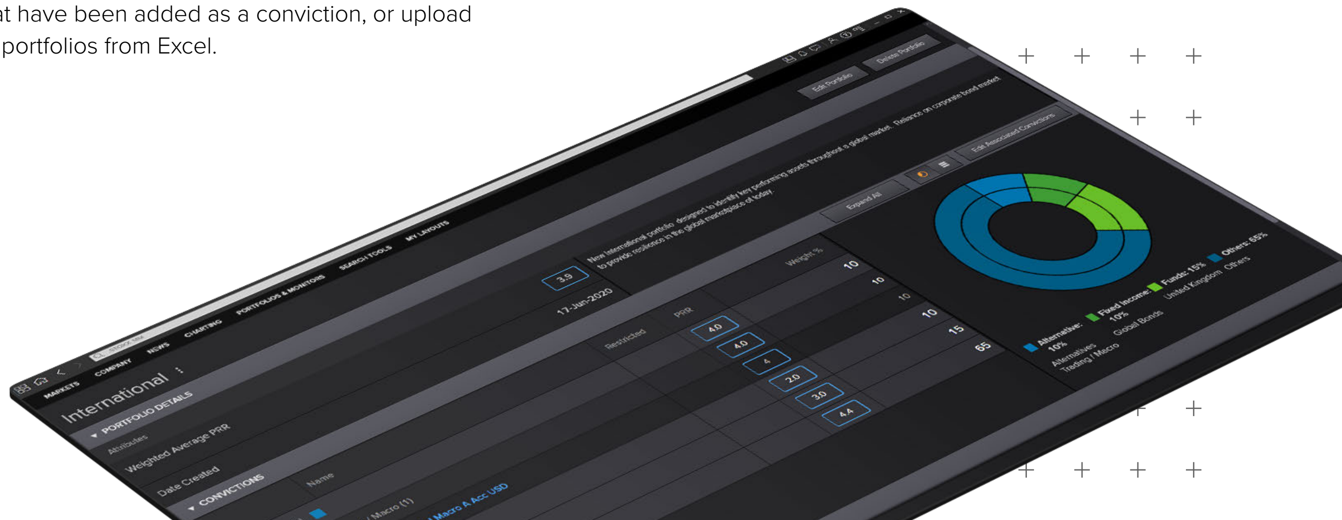
Improve advisor efficiency and provide a better service to clients

The House Views and Market Insights screens commingle cross-asset investment recommendations for equities, bonds, funds and FX instruments, proprietary or third-party research, and model portfolios with relevant market data and news in one place.

A flexible platform tailored to the specific workflow needs of advisors

Access the most relevant information needed with automatically tagged content, conviction-change notifications, and user-defined alerts. Advisors can quickly access the firm's proprietary knowledge and manipulate data on screen or export it to Excel, informing decisions on client recommendations.

With multiple distribution channels, information can be retrieved either via the dedicated application in Refinitiv Workspace for Wealth Advisors or integrated into third party environments via API.



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THE CONTENT, TECHNOLOGY AND WORKFLOW TOOLS TO ACCELERATE GROWTH.

To find out more about how Refinitiv Workspace for Wealth Advisors can help you grow your business and deepen client engagement, please visit **refinitiv.com/workspace-wealth**.

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