QUARK INVESTMENT RESEARCH REPORTING SOLUTION
INVESTMENT RESEARCH IN THE DIGITAL AGE

We live in the era of now. Your customers want to access your investment research whenever they want, wherever they are, on whatever device they choose? Now they can. The Quark Investment Research Reporting Solution allows your company to:

- Create personalized, interactive, up-to-the-minute research opinions and advice
- Automatically assemble and publish to email, Web, PDFs, aggregators, tablet and smartphone apps
- Dramatically increase the volume of quality research without adding resources
- Give clients more of what they want through deep insights, analytics and visualizations
- Streamline collaboration and review and approval, automate compliance and production processes
- Understand what research clients are viewing with consumption feedback

SOLUTION HIGHLIGHTS

Create Up-to-the-minute Research Opinions and Advice
The right information at the right time can shape your customer’s experience. By taking a dynamic publishing approach, the process is streamlined, enabling personalized, timely research from a single content source.

Instant Multi-Channel Publishing
Automatically assemble personalized research reports for each client and their preferred media. Publish instantly to print, PDF, email, Web content, HTML5, tablet and smartphone apps and third-party content aggregators.

Advanced Authoring Capabilities
Analysts benefit from a range of authoring tool options to create reusable, structured content. On-demand previews enable authors to see how their research opinions look published to each conceivable media.

Automation of Routine Editorial Tasks
Quark’s content structuring technology reduces editorial effort through automated rule-based content scanning. Supervisory analysts can confirm adherence to corporate style guides while authors focus on value-added edits.
Richer Interactive Experiences
Mobile adoption is exploding. With the Quark Investment Research Reporting Solution, analysts can provide clients with a richer, interactive experience that’s appropriate for any device they’re using.

Easy Integration with Third-Party Platforms
The Quark Investment Research Reporting Solution securely integrates with everything from Microsoft Excel to complex business infrastructures. Distribute research using standards such as RIXML and integrate with social media tools.

Interactive Charts and Tables
Integrate tables and charts with real-time data such as streaming stock information. Automatically bring data to life with interactive, graphically rich info-graphics that clients can manipulate on their digital devices.

Social Media Linking
Leverage social media such as LinkedIn and Twitter to source and publish research opinions. See what’s trending and connect clients with analysts all while staying within compliance requirements.

Readership Tracking
Use client interest to drive personalization and research planning. Connect content delivery to CRM systems to see readership patterns, which research is being consumed and the needs of specific clients.

Integrates Local, Remote and Offshore Analysts
Remote analysts can securely collaborate with office-based colleagues since all analysts and stakeholders are fully integrated into the review and approval processes, irrespective of their location.

Component-Level Workflow and Content Lifecycle Control
Track and manage reusable content components across multiple documents and media. Copy and paste is replaced with robust content lifecycle controls to ensure accuracy and compliance.

Automated Regulatory Compliance Checks
With the Quark Investment Research Reporting Solution, research departments automate routine tasks such as black and gray list identification and any necessary disclosures. Hidden compliance workflows can be incorporated as required.

Research Personalization
Create and market content for specific target audiences. Tag content for an individual, group or client then automatically filter during publishing. Narrative content can be identified at the phrase, sentence, paragraph or section level.

Content Security
Restrict editing based on user rights while tracking version history. Manage entitlement rights at a very granular level combining security with flexibility. It also integrates with existing user authentication systems.

Rich Metadata
A customizable user interface enables analysts to easily associate metadata with a report manually or automatically. Applying metadata allows a high degree of granularity for content reuse, indexing, search and search engine optimization (SEO).

Professional Design Capabilities
Differentiate your research brand using all the rich functionality of award-winning professional page layout and design software. Research report templates benefit from WYSIWYG design tools, precision typography, advanced color management and interactive features for adding slideshows, video, and more to enhance your research products.
OVERVIEW OF INVESTMENT RESEARCH REPORTING SOLUTION WORKFLOW

CONSUME ➔ Excel  3rd Party Data

CREATE ➔ Author  Repeating Graphics

MANAGE ➔ Lifecycle  Compliance  Data Services  Narrative Components

PUBLISH ➔ PDF  Email  Web

DELIVER ➔ Email  Web Portal  Aggregators

INTERACT ➔ Printer Network  Social Media  Records Management  Web Portal  Mobile

www.quark.com/enterprise
BENEFITS

Lower Cost Structure
Automate the research production process and reduce the time and cost of creating and publishing investment research by up to 85%. By integrating a best-in-class research reporting solution, you can reduce internal development and support costs and support the latest technologies and digital devices.

Reduce Risk
Implement compliance automation to reduce the time and cost of meeting burgeoning compliance and regulatory requirements. Minimize organizational and individual risk while streamlining the content and legal review processes to ensure tracked signoff.

Customer Retention
Better serve clients and increase competitive edge by delivering relevant, targeted investment research and opinions by PDF, email, social media and the latest digital devices. Include engaging, interactive content and leverage reader insights to create personalized reports that better serve each client’s unique needs.

Minimize Disruption
By offering a variety of authoring options including direct integration with Microsoft Word and Excel, research analysts can be up and running quickly with little to no training. In addition, the modern, open architecture of the Quark Investment Research Reporting Solution enables easy integration with existing business systems.

Time to Market
By allowing analysts to focus on content – not formatting – while automating compliance, approval and production processes, research reports can be published faster. This means more research published to more channels without increasing your resources. What’s more, creating and publishing information faster than the competition can lead to differentiated product service and superior value to clients.

Reduce Errors
Eliminate copy and paste and rekeying errors to produce higher quality products. Ensure there are no inconsistencies between different research products by reusing the exact same “referenced” content in multiple locations and media types.

ABOUT QUARK SOFTWARE INC.
Quark’s software enables organizations of all sizes to meet customer demand for engaging, relevant communications when, where and how they want them. Our solutions combine the power of XML with flexible layout and design to automate the delivery of customer communications to print, Web, and interactive experiences on the latest digital devices. Financial services firms, manufacturers, and governments around the world rely on Quark solutions to elevate customer communications to new levels, reduce time to market, and lower costs.

To find out more about Quark Enterprise Solutions visit [www.quark.com/enterprise](http://www.quark.com/enterprise) or contact us at [www.quark.com/contact](http://www.quark.com/contact)

Denver | London | Paris | Tokyo | Hamburg | Mohali | Tampa | Basingstoke | Dublin

©2014 Quark Software Inc. All rights reserved. Unauthorized use and/or reproduction are violations of applicable laws. Quark and the Quark logo are trademarks or registered trademarks of Quark Software Inc. and its affiliates in the U.S. and/or other countries. All other marks are the property of their respective owners. 18614IFS_1_US