

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



print, PDF, email, Web content, HTML5, tablet and smartphone apps and third-party content aggregators.

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

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.

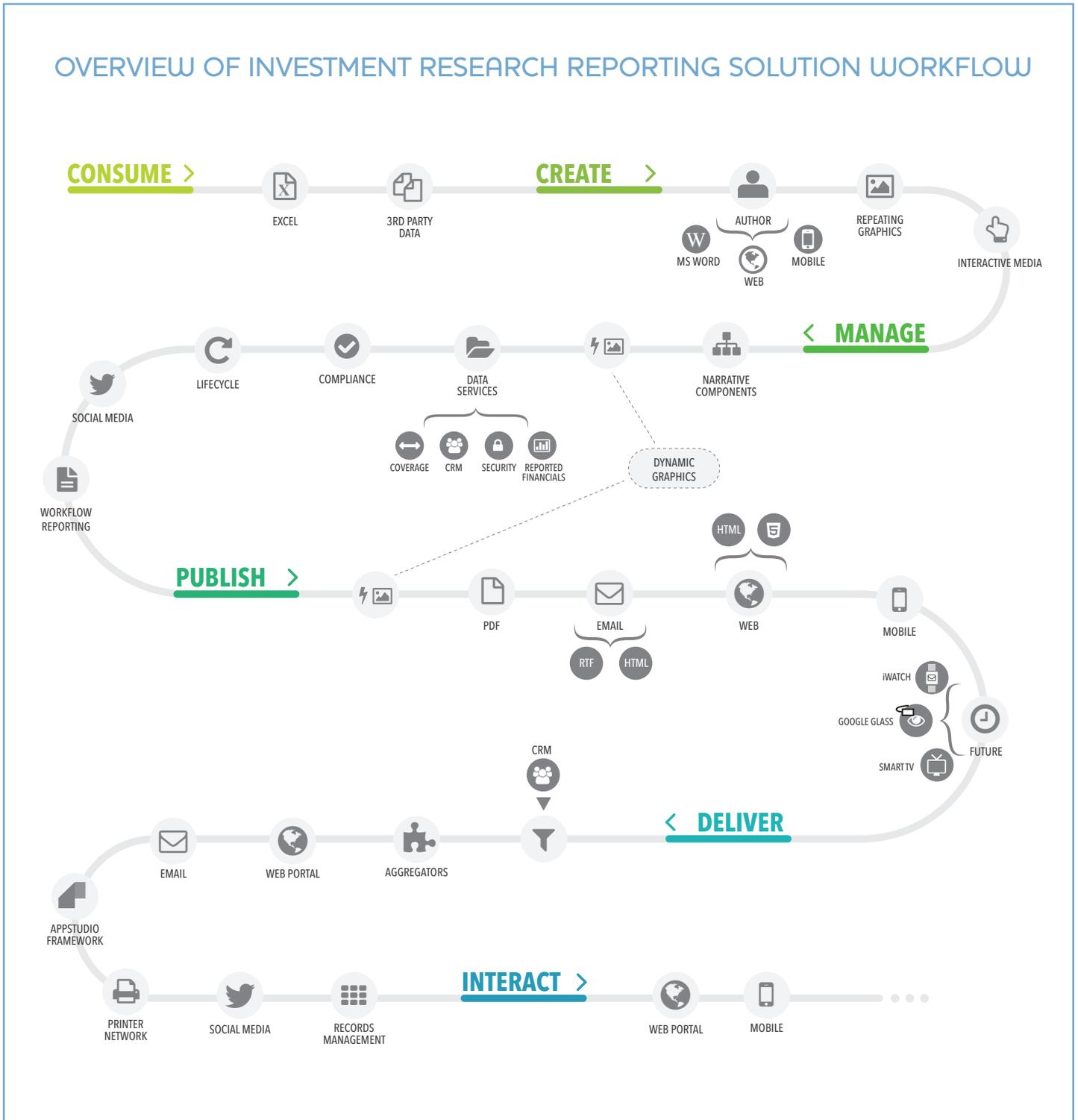
Rich Metadata

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



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 or contact us at www.quark.com/contact

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