



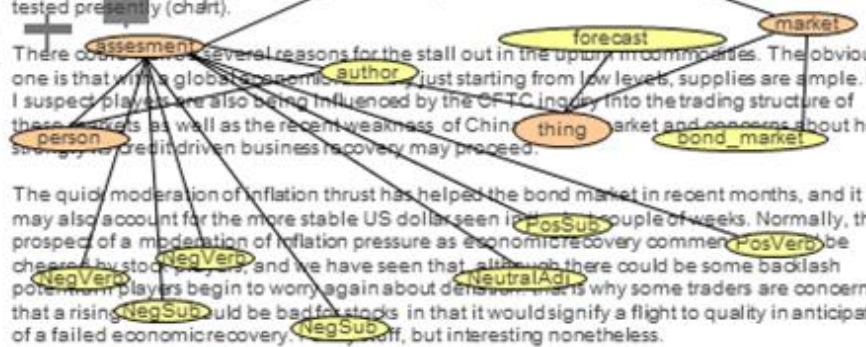
FIRST

Large scale information extraction and integration
infrastructure for supporting financial decision making.

My inflation pressure gauge rose at a good clip over the first half of this year on the strength of a rally in the commodity market. **commodity_market** seasonally adjusted, increased by 2.7% for the year through Aug. However, the pressure gauge has flattened out in recent months as the rally in commodities has stalled. In fact, **NeutralAd** and in the commodities market for '09 is being tested presently (chart).

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Retail Investments: Decision Support beyond traditional market information

Dr. Alexandra Winter

Interactive Data Managed Solutions AG

March 29th 2012



Why First?

Seamless integration of complementary information into state-of-the-art financial information systems

Innovative, comprehensive FIS that increase customer retention

Broadened support of decision processes

Retail clients/users



Discount
brokerage/portal
based business

Focus on single
instruments and
single, yet small to
medium sized
portfolios

Workflow(s): Pick &
Choose, Buy/Sell
decisions



Rare incorporation of
unstructured
information

If by chance actors
encounter related
news, threads etc.

The Challenge: Picking the right instrument

Stock Screener

Stock Screener | ETF Screener | Mutual Fund Screener

Research Snapshot Recent Quotes

Create a Screen | Community Favorites | Predefined Screeners

Mid to Mega Cap Growth Predefined [View All Predefined Screens](#)

Add Additional Criteria | Reset Selections | Reset Screen

Profile Market Capitalization	<input type="button" value="Micro Cap"/> <input type="button" value="Small Cap"/> <input checked="" type="button" value="Mid Cap"/> <input type="button" value="Large Cap"/> <input type="button" value="Mega Cap"/> <input type="button" value="x"/>	3502 Total Matches
Fundamentals Return on Equity (% MRFY)	<input type="text" value="Greater than or equal to"/> <input type="text" value="15"/> % <input type="button" value="View Buttons"/> <input type="button" value="x"/>	747 Total Matches
Growth 3 Year Annual Revenue Growth Rate (%)	<input type="text" value="Greater than or equal to"/> <input type="text" value="12"/> % <input type="button" value="View Buttons"/> <input type="button" value="x"/>	156 Total Matches
Growth 3 Year Annual Income Growth Rate (%)	<input type="text" value="Greater than or equal to"/> <input type="text" value="12"/> % <input type="button" value="View Buttons"/> <input type="button" value="x"/>	120 Total Matches

The Challenge: Picking the right instrument

Stock Screener

Stock Screener | [ETF Screener](#) | [Mutual Fund Screener](#)

Research Snapshot Recent Quotes

Mid to Mega Cap Growth Predefined

Profile
Market Capitalization

Micro Cap Small Cap

Fundamentals
Return on Equity (% MRFY)

Greater than or equal to v

Growth
3 Year Annual Revenue Growth Rate (%)

Greater than or equal to v

Growth
3 Year Annual Income Growth Rate (%)

Greater than or equal to v

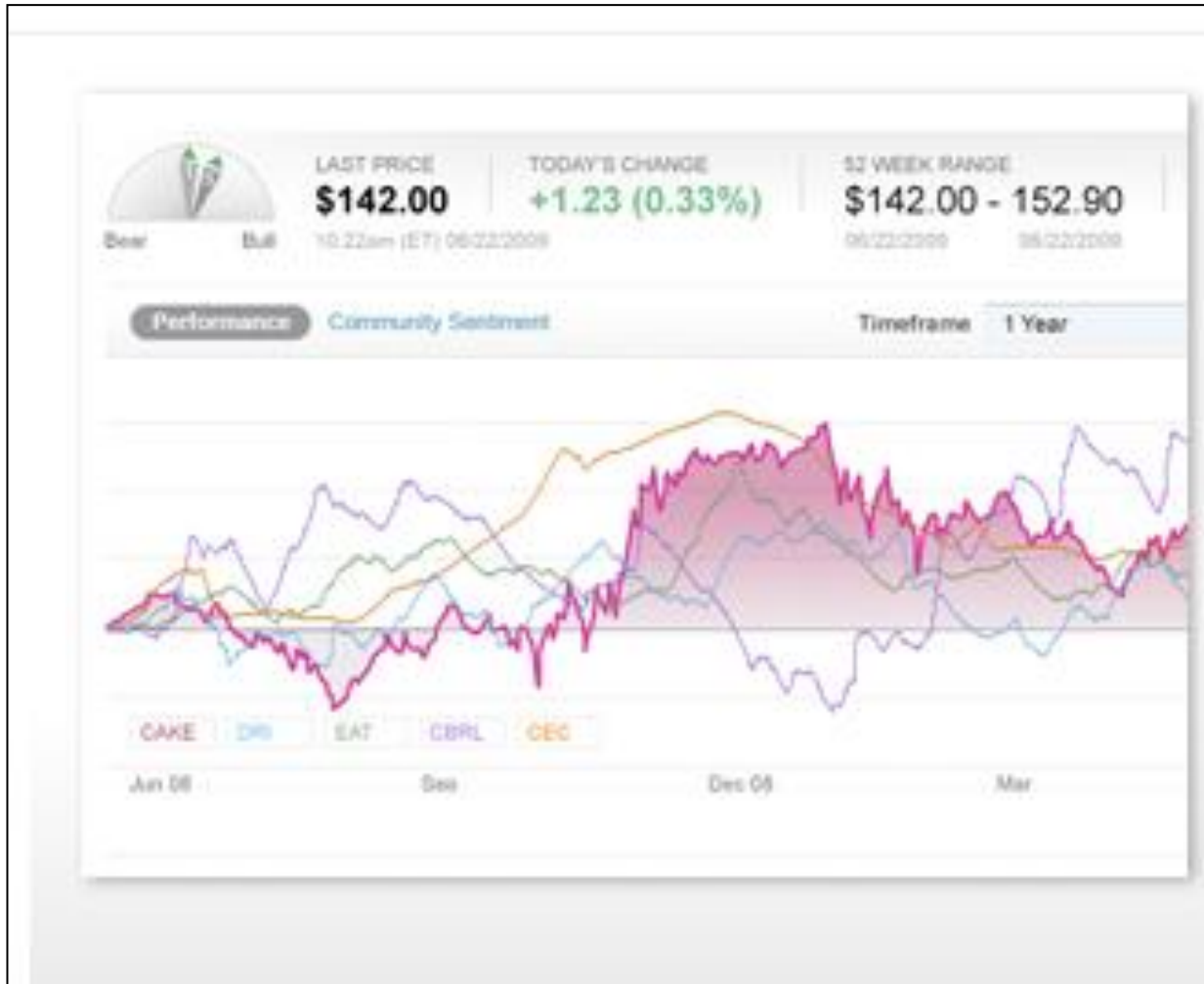
Screen Results: 120 matches

Criteria: Market Capitalization Mid Cap Large Cap Mega Cap | Return on Equity (% MRFY) greater than 15 | 3 Year Annual Revenue Growth Rate (%) greater than 12 | 3 Year Annual Income Growth Rate (%) greater than 12

My Criteria
Profile
Performance
Fundamentals
Margins
Valuation
Earnings & Dividends
Growth
Zecco Sentiment

Name	Symbol	Current Price	52-Week Low (%)	% Above 52-Week Low (%)	52-Week High (%)	% Below 52-Week High (%)	1-Year Price Performance (%)	5-Year Price Performance (%)	Trade
ADTRAN Inc	ADTN	35.25	+38.45%	+26.10%	-22.13%	+54.74%	Buy Sell		
African Bank Investments Ltd	AFRYV	25.95	+35.09%	+10.79%	+1.57%	+32.74%	Buy Sell		
Alliance Resource Partners LP	ARLP	71.77	+23.74%	+14.66%	-7.08%	+106.83%	Buy Sell		
American Capital Agency Corp	AGNC	30.71	+39.40%	+0.65%	+4.31%	N/A	Buy Sell		
ANTA Sports Products Ltd	ANPDF	1.11	+29.07%	+42.19%	-28.39%	N/A	Buy Sell		
Apache Corp	APA	107.93	+47.77%	+19.53%	-10.70%	+57.61%	Buy Sell		
ASM International NV	ASMI	37.54	+75.17%	+17.31%	-7.38%	+63.22%	Buy Sell		
ASML Holding NV	ASML	45.55	+48.61%	+4.65%	+5.22%	+69.69%	Buy Sell		
Assured Guaranty Ltd	AGO	16.80	+83.41%	+9.39%	+15.62%	-40.64%	Buy Sell		
Astra International Tbk PT	PTAY	16.50	+32.32%	+7.46%	+43.48%	N/A	Buy Sell		
Baidu Inc	BIDU	136.70	+35.41%	+17.63%	+16.01%	+1,186.95%	Buy Sell		
Banco do Brasil SA	BDORY	16.23	+39.31%	+16.30%	-10.78%	N/A	Buy Sell		
Bruker Corp	BRKR	16.03	+39.63%	+25.96%	-15.50%	+76.93%	Buy Sell		
China Merchants Holdings (International) Co Ltd	CMHMF	3.30	+17.86%	+29.79%	-24.14%	-13.16%	Buy Sell		
China Oilfield Services Ltd	CHOLY	35.00	+53.51%	+24.81%	-13.15%	+150.00%	Buy Sell		
China Overseas Land & Investment Ltd	CAOVF	2.12	+61.83%	+26.64%	+30.06%	+101.90%	Buy Sell		
China Petroleum & Chemical Corp	SNP	113.29	+37.32%	+9.63%	+10.42%	+42.23%	Buy Sell		
China Yurun Food Group Ltd	CYUFF	1.39	+49.73%	+64.03%	-56.72%	+42.05%	Buy Sell		

The Challenge: Picking the right instrument



The Challenge: Picking the right instrument



The Challenge: Picking the right instrument

Index

DAX PERFORMANCE-INDEX

Darstellung

absolut

relativ

Zeitraum

6 Wochen

Aktie

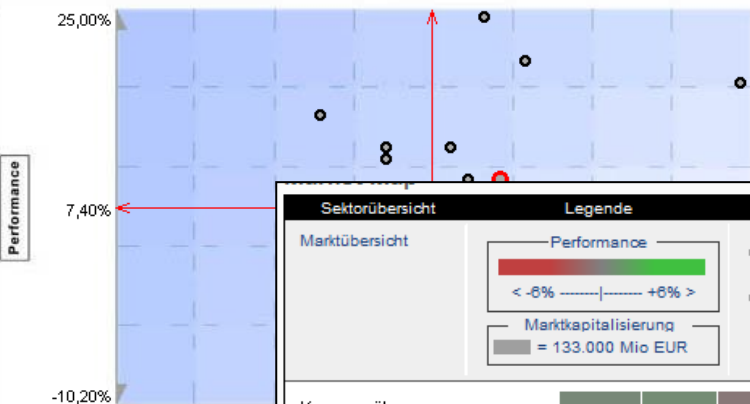
DEUTSCHE BANK AG NAMENS-AKTIE O.N.

Volatilität: 32,00%

Performance: 10,00%

Aktie

- ADIDAS AG NAMENS-AKTI...
- ALLIANZ SE VINK.NAMENS...
- BASF SE NAMENS-AKTIE...
- BAYER AG NAMENS-AKTIE...
- BAYERISCHE MOTOREN W...
- BEIERSDORF AG INHABER...
- COMMERZBANK AG INHAB...
- DAIMLER AG NAMENS-AKT...
- DEUTSCHE BANK AG NAM...**
- DEUTSCHE BOERSE AG Z...
- DEUTSCHE LUFTHANSA A...
- DEUTSCHE POST AG NAME...
- DEUTSCHE TELEKOM AG N...
- E.ON AG NAMENS-AKTIE...
- FRESENIUS MEDICAL CARE...
- FRESENIUS SE & CO. KGA...
- HEIDELBERGCEMENT AG I...
- HENKEL AG & CO. KGAA I...



TEK RANGE

12.00 - 152.90

Sektorübersicht

Marktübersicht

Legende

Performance

< -8% |-----| +6% >

Marktkapitalisierung

= 133.000 Mio EUR

Farben

rot/grün

blau/gelb

Zeitraum

1 Woche

4 Wochen

52 Wochen

Unternehmensinfo

Firmenname

Bauindustrie

Marktkapitalisierung

164.518 Mio EUR

Performance

+1,94%

Sektor	Performance
Konsumgüter	...
Energie / Rohstoffe	...
Technologie	...
Chemie / Pharma / Gesundheit	...
Finanzsektor	...
Telekommunikation	...
Diverse	...
Handel	...
Versorger	...
Software	...
Kraftfahrzeugindustrie	...
Informationstechnologie	...
Transport / Verkehrssektor	...
Medien/Entertainment/ Freizeit	...
Industrie	...
Bauindustrie	...



The Vision: Incorporation of unstructured data

LATEST ARTICLES

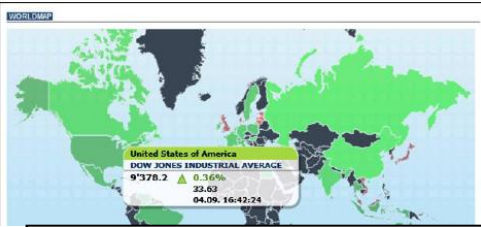
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by SA Editor Miriam Metzinger • Comment! • 20 minutes
- **Cramer's Mad Money - An Antidote To Internet II** (3/7/12)
by SA Editor Miriam Metzinger • Comment! • 22 minutes
- **Presidential Life: Another Example Of Market Inefficiency**
by Se

+2.83	+1.66	+0.96	+0.66	+0.17	-0.13	-0.76
MUV2	ENI	SNW	FTE	BAY	DB1	BNP
+1.66	+0.88	+0.56	+0.07		-0.18	-0.99
DBK	VOW	TOTB	EOAN		LOR	TOI
+0.86	+0.50	+0.03		-0.22	-1.08	-1.72
BSN	GZF	SAP		DTE	MOH	ALV
+0.31			-0.43	-1.12	-1.74	-2.10
UN3			SE	XCA	ARRB	SQU
	n.a.	-0.60	-1.18	-1.76	-2.14	-2.41
	NOA3	VVU	CAR	REP	BOY	AOIMD
	n.a.	-0.69	-1.29	-1.88	-2.24	-2.52
	PHI1	ENL	TNE5	IBE1	BAS	RNL
						IES
						SGE

MSFT IN FOCUS

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ALLIANZ ARCANDOR CHF/EUR COMMERZBANK DAIMLER
 DEUTSCHE TELEKOM DJES 50 PREUR DOW JONES INDUSTRIAL
 AVERAGE DT BANK E.ON AG EUR/AUD EUR/CHF EUR/CZK
 EUR/GBP EUR/USD GBP/EUR **GERMANY**
DAX(TR) GERMANY MDAQ(TR) GERMANY TECDAX(TR)
 GOLD INFINEON TECHNOLOGIES K+S PORSCHE AUTO
 HD Q-CELLS A QIMONDA ADR 1 SIEMENS SOLARWORLD
 TUI USD/EUR VW



Break barriers
between
heterogeneous data

Visualize assessment
of semi-/unstructured
data

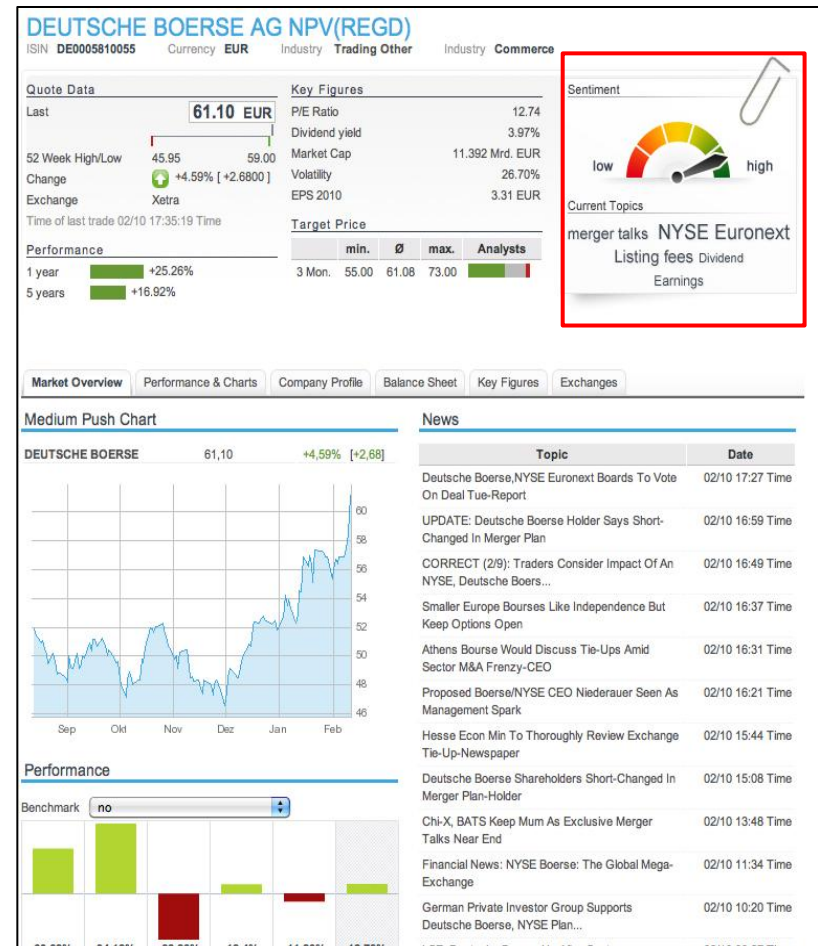
Convey relevant
information at a
glance

Sentiments: Condensed unstructured information

Support and improve individual decision making by incorporating sentiments derived from semi-/ unstructured sources

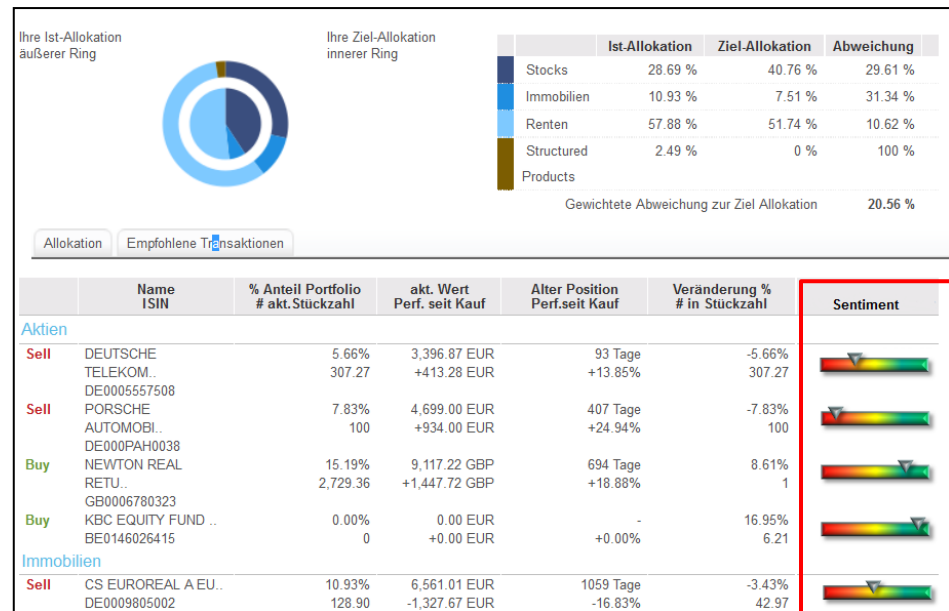
Automation of reviewing various sources

- unburdens the actor of performing this task by himself
- results in a sentiment that aggregates opinions extracted from various yet unused sources



Augmentation of available set of indicators will leverage the process of decision making

Sentiment per financial instrument: condensed evaluation of the content of a multitude of related semi-structured and unstructured information documents



Individually composed
baskets

Markets / Sectors /
Regions

Indices

Single
Instruments



Articles, news, analyst reports, comments published in







- News streams
- Blogs
- Social networks
- Bulletin boards
- Discussion forums

Structured data and metadata



- Price information
- Technical indicators
- Reference data (identifiers)
- Relation among instruments (e.g. index constituents)

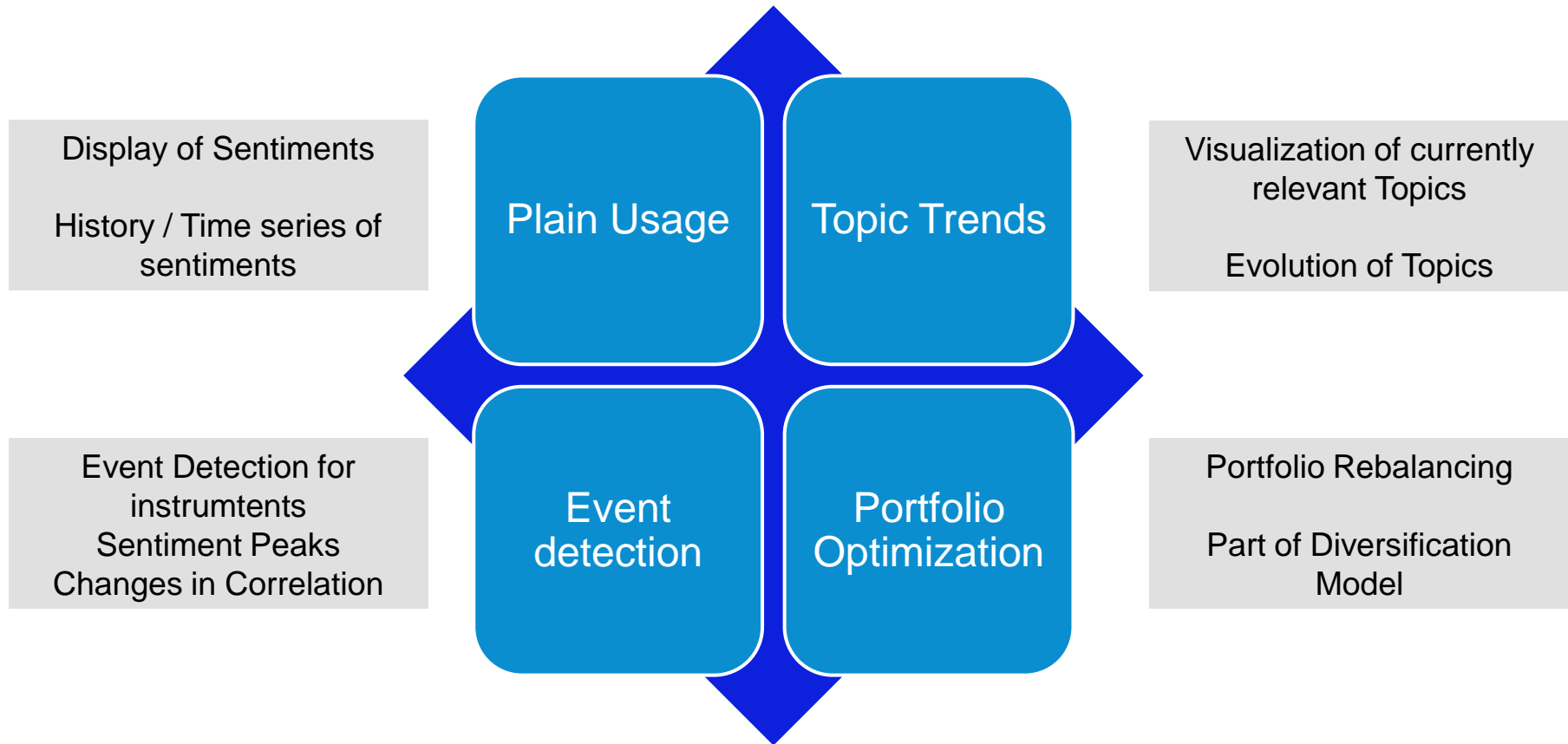
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10:32 AM • Paulo Santos
-  **Royal Bank Of Scotland: Preferreds Should Resume Dividends**
9:55 AM • Michael Terry



Dow Jones	S&P 500	NASDAQ
12,754.68	1,341.80	2,908.81
 -208.13	 -22.53	 -41.67
-1.61%	-1.65%	-1.41%



Sentiment-related indicators with prognostic relevance regarding e.g. future performance or volatility

Value-added reports and recommendations based on these indicators

Visualization how topics evolved and what was their impact

Discrete (e.g. Negative, neutral, positive) or continuous values (e.g. [-1;1])





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Acknowledgement

The research leading to these results has received funding from the European Community's Seventh Framework Programme (FP7/2007-2013) under grant agreement n°257928.

THANK YOU!

