Research Solution: end-to-end investment research authoring and distribution

Research Solution will transform the quality and efficiency of your research production.

You control every part of the process from the analyst model through to distribution of the final report. Research Solution's comprehensive database, well designed Word templates and powerful production tools give you complete confidence in your reports throughout the publishing process.

Control quality of your research production:

- Report creation in Microsoft Word
- Centralised financial database
- Automatic population of document content
- Compliance, disclosure and disclaimer management
- Data analysis intranet with export to Excel
- Production tools to increase authoring efficiency and accuracy
- Full tagging and PDF creation for distribution

Consistent Financial Data

Analysts upload forecast changes to the Research Solution database from their Excel models. Uploads are validated to ensure consistency and data integrity, whilst allowing for complete variation between sectors. The application integrates this data with Thomson Reuters market data feeds providing a consistent basis of calculation.

Comprehensive analysis of your stock universe is available using the Stock Analyser intranet. Results are easily exported to Excel for further analysis, manipulation and insertion into reports or presentations. The application provides a full audit trail, including the management of the complete forecast change history.

Content Authoring

Analysts can easily author in-brand reports using our powerful and intuitive production tools which manage all formatting of page layouts, text, charts and tables. Financials and compliance information is automatically populated into your publications.

Research Solution's advanced publishing tools save hours when compiling aggregated reports. Comprehensive stock books are created fully automatically with no user interaction required. Supporting PowerPoint presentations are easily created via Power Pack - Mediasterling's presentation and pitch book software.
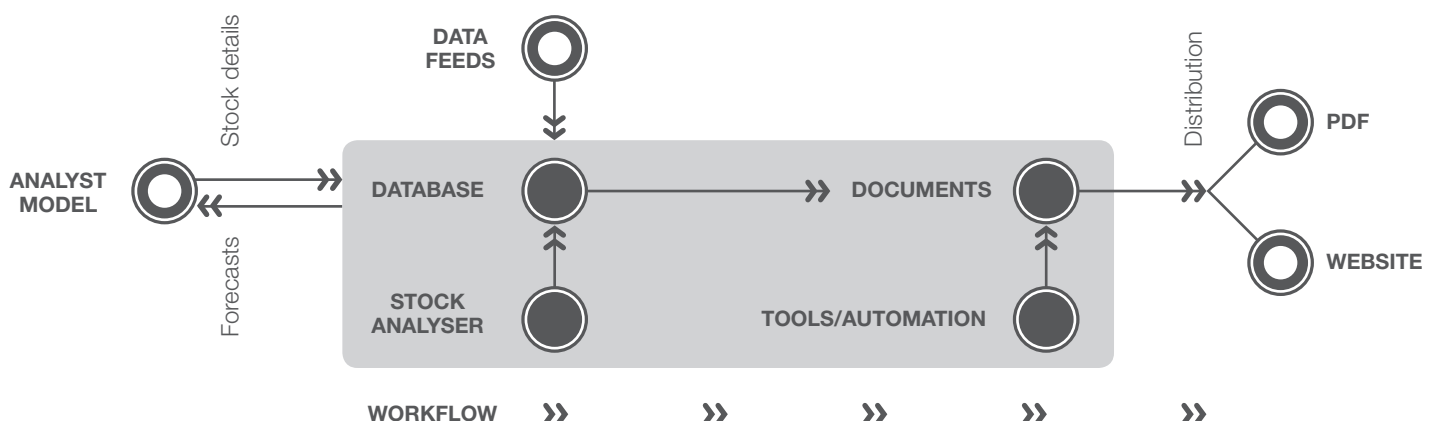
Workflow and distribution

Research Solution's configurable workflow manages publications through all production stages to distribution. Based on Microsoft SharePoint, Research Solution's optional workflow module is fully integrated into Microsoft Office. This provides a versatile and flexible solution including centralised document storage, version control and full audit trail. Multiple workflow paths and automated email alerts give efficient document production management that is ideally suited to larger teams, particularly in multiple locations.

Research Solution can be integrated with your CRM for email distribution. We can provide a research website or integrate with proprietary research websites.

Business case

- Faster production times and increased efficiency
- Consistent data, compliance and regulatory information
- Familiar Microsoft Office products, existing Excel models
- High visual quality and clarity for all your reports and presentations

System Overview

Generate Perfect Content

Investment Research

Business Development

Reports, Templates & Tools

Mediasterling has over 18 years' experience implementing design-driven technology solutions for financial and professional services firms to create high quality, branded content.

As an owner-managed company our directors are hands-on, working with you at every stage of your project offering practical advice and solutions matched to your needs.

Where projects benefit from initial design, we can deliver a fresh look within your brand or advise your creatives, so you get the best style, clarity and visual consistency.

Functionality that is easy to use is intrinsic to our software development. Your teams will generate perfect content from day one, with little or no training necessary. We also integrate with your technologies and infrastructure for minimal change of work processes and IT impact.

Your project will be managed smoothly and efficiently, backed up with first rate technical support. See our client list for a sample of the companies we have worked with.

Applications

We develop powerful, cost effective authoring tools for the Microsoft suite of products. Using our software, our clients create superior brand accurate documents in the applications they use every day.

Research Solution
Author, analyse and distribute compelling investment research.

Forward Pitch
Business generation software for bids, tenders and proposals in Word.

Power Pack
Presentation and pitch book creation, and brand management in PowerPoint.

Report Author
Legal, financial and technical reporting software for Word.

Microsoft Office Tools
Custom ribbons, chart creation and template management.

Online CMS
Websites and multi-contributor document portals.

Clients

Financial Services

- Altium Capital
- Anoa Capital
- Banca IMI
- Barclays
- Bridgepoint
- Cantor Fitzgerald
- Cenkos
- CI Capital
- Daniel Stewart & Co
- Danske
- DNB
- FinnCap
- Liberum
- Marwyn
- NCB Capital
- Numis
- Panmure Gordon
- Peel Hunt
- Rasmala
- Redburn
- Sanlam
- Shore Capital
- Stifel
- VietNam Holding

Law & Professional

- Aon
- Bates Wells Braithwaite
- Cripps
- Grant Thornton
- JLT
- Marsh
- Norton Rose Fulbright
- Olswang
- Three Crowns
- Tokio Marine
- Watson Farley & Williams
- Wiggin

Creative Agencies

- Bibliothèque
- Brand Union
- Campaign Works
- Imagination
- Interbrand
- Landor
- Overture London
- Philosophy
- Siegal + Gale
- The Brand Union
- The Partners
- Wolff Olins

Industry

- BBC World
- BP
- Design Council
- Hays
- Informa
- Johnson Services
- Momenta
- NHS
- Robert Walters
- South East Water
- Yorkshire Water
- World Gold Council

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