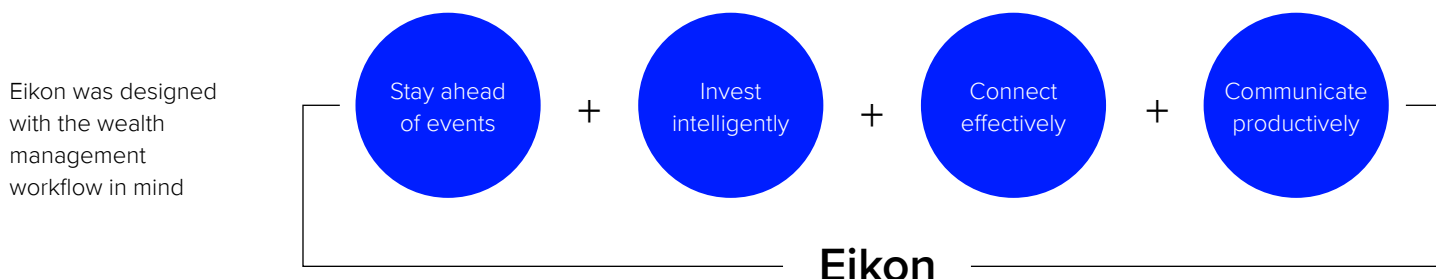




REFINITIV® EIKON – WEALTH  
MANAGEMENT

A scalable, end-to-end solution for wealth management firms

Refinitiv® Eikon provides real-time cross-asset market data and news, analytic capabilities, applications and reporting tools to meet the workflow needs of the financial advisors within your firm. This powerful customizable platform delivers timely information, simplicity and connectivity to improve advisors' productivity and their ability to serve clients.



## The leading open platform for wealth managers

Designed to meet the needs of different users within your organization, Eikon connects teams and offices with robust capabilities on an open platform.

Eikon gives easy access to content that's delivered with speed, filtered by relevance and displayed in a highly visual way that's easy to grasp and act on. Available on mobile, Web and desktop, the platform brings together our capabilities to support the full workflow of wealth management professionals:

- Stay up to date with global markets and access information wherever and whenever you need it
- Effectively distribute research and intelligence throughout your organization
- Enable advisors to generate actionable investment ideas for clients
- Connect investment advisors and relationship managers on a single scalable platform

## Advanced analytic capabilities

With Eikon, you can customize a suite of performance analytics, screening and charting tools that allow users to visualize information, implement optimal portfolio strategies and transform the way they see opportunities. These tools and capabilities, which include broker statistics and interactive maps, support your research, portfolio construction and monitoring.

## Create customized market-monitoring views

Eikon enables advisors to customize layouts with its simple drag and drop functionality, linking multiple monitoring apps to create personalized displays. Enhanced market monitoring allows you to track up to 500 instruments as well as include broader content sets and a multiple table mode.

## All the data, news and research you need in one view

Because Eikon is an open platform, your firm can access Refinitiv data and vast amounts of global third-party content. With cross-asset class content, breaking news and continuously updated information, users can stay ahead of global markets and world events, and bring intelligence to every conversation and recommendation.

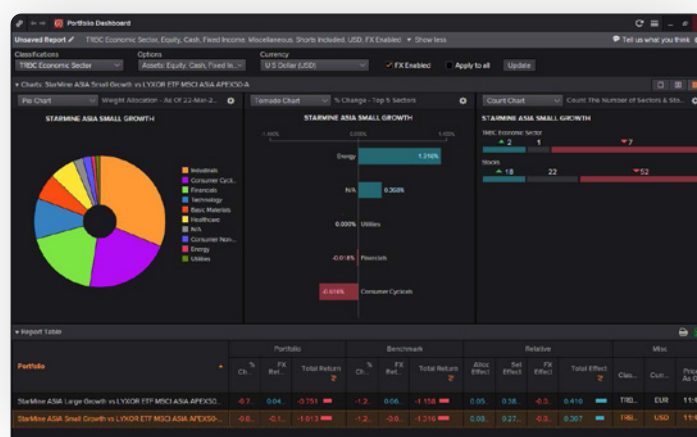
In addition, the Eikon App Studio allows wealth managers to incorporate their own proprietary data into the Eikon platform, delivering even greater connectivity.

### Market-leading news

Reuters News brings you the latest financial, business and political news from around the world. With Reuters Breakingviews, you'll gain cutting-edge news analysis on market-moving events.

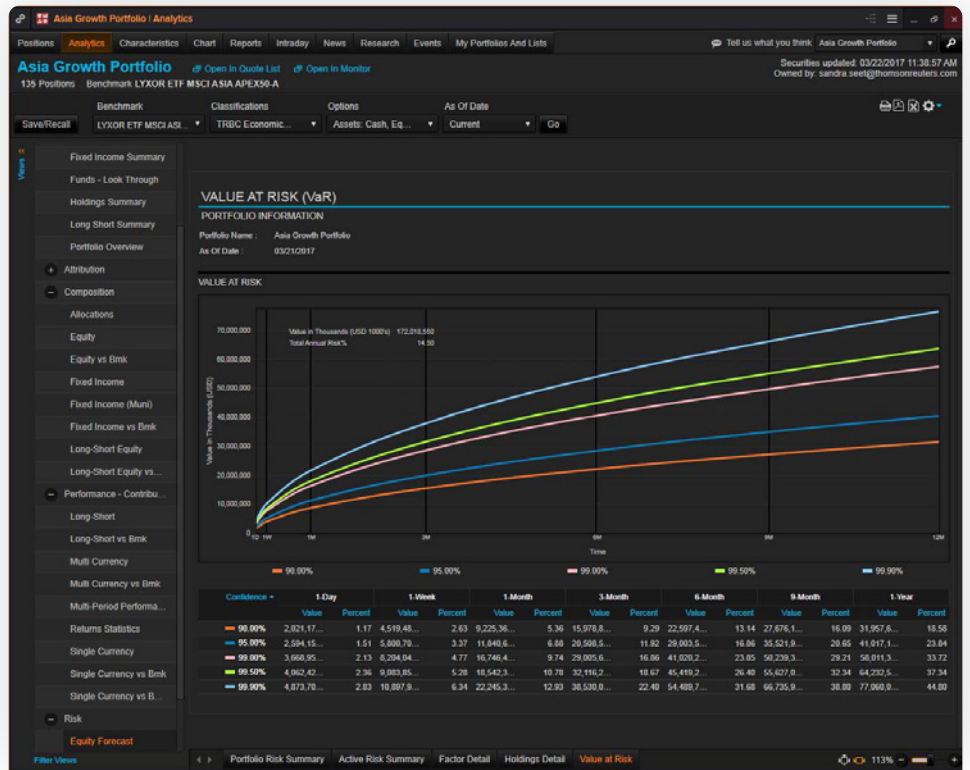
### Instant analysis across all asset classes

Country, industry and company views provide easy access to data and insight from a macro, sector and individual stock level. With more than 30 charting analysis and overlay tools, Eikon provides valuable charting and data export tools.



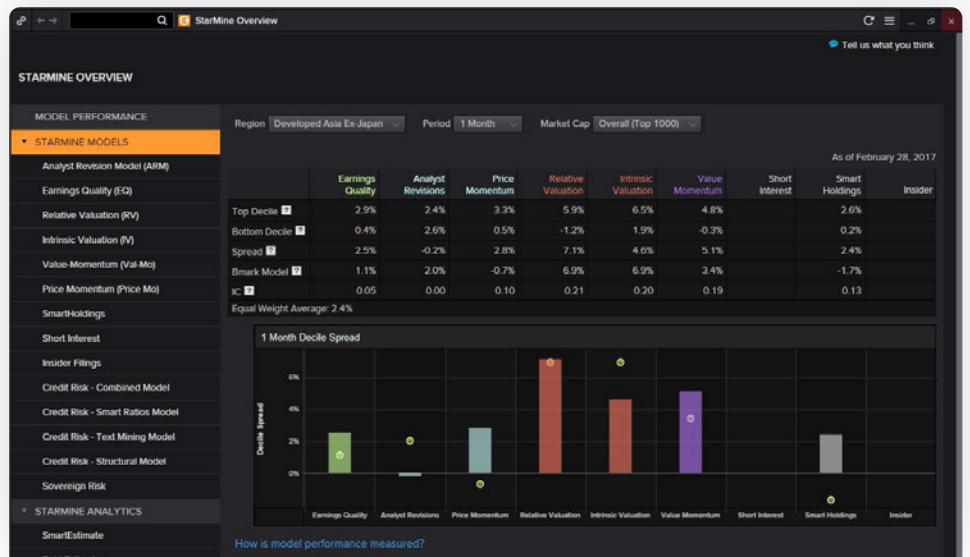
### Analyze portfolio performance in real time

Eikon offers asset allocation tools to help optimize your asset selection and portfolio analytics. These highlight performance and risk across asset classes, mutual funds, ETFs and blended benchmarks.



### Find new insights and investment ideas with powerful research tools

Eikon provides powerful research and analytical tools. As part of this, your firm will gain access to Refinitiv® StarMine®, an award-winning collection of proprietary alpha-generating analytics and models spanning sectors, regions and markets. StarMine Quantitative Models, such as SmartEstimates, Earnings Quality and Intrinsic Valuation, are essential tools to execute a wide range of investment styles. In addition, the screener helps you find relevant securities using filters across estimates, fundamentals and StarMine analytics.

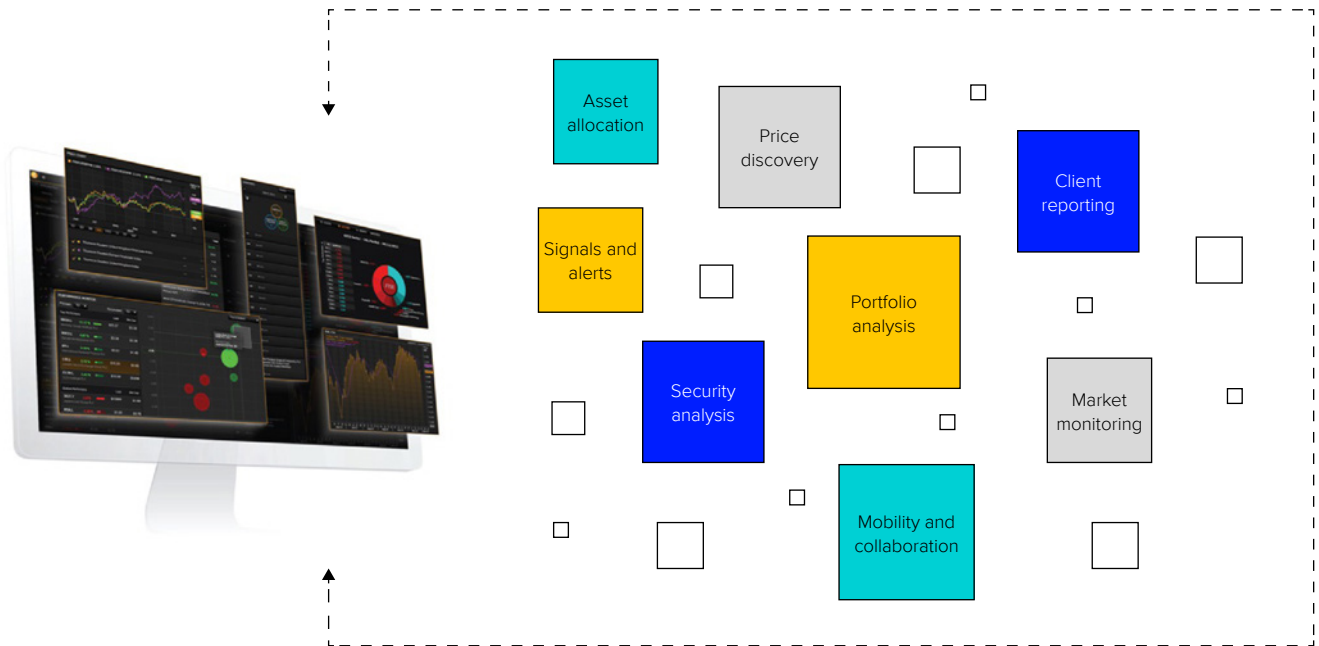


### Enhance fund selection through fund ratings

Selecting and analyzing funds is critical to wealth advisors. Through Eikon, advisors can view Refinitiv® Lipper® fund data for mutual funds around the globe. As part of this, the renowned Lipper Leaders rating system enables advisors to select and screen funds by total return, consistent return, preservation, expense and tax efficiency.

## Simplify distribution of investment ideas

With Eikon, research and investment ideas that are often accessed across multiple sources are now available via a single platform. Eikon Messenger and the App Studio enable your investment teams to generate and distribute investment ideas, research and strategy, all connected to live data, charts and analytics via a highly secure network.



## Eikon App Studio integrates proprietary data and functionality

As an open platform solution, Eikon offers unique financial app development through the Eikon App Studio. The App Studio lets you tailor and enhance internal workflows by easily integrating specialist applications and content to deliver improved connectivity and productivity.

## Eikon Messenger connects users across the organization

The ability to connect your teams and offices via the Eikon platform drives improved communication. Eikon Messenger is a secure and compliant business tool that ensures all users are kept up to date with investment ideas, strategies and news. Build internal communities to share live data, charts and analytics.

## An array of other features enhance productivity

Eikon is designed to improve the efficiency and responsiveness of wealth managers. Eikon enables advisors to analyze and present content in Excel® and other Microsoft Office® products. Eikon is also available on all mobile devices, enabling advisors to gain access to information when and where they want.

## Flexible and efficient throughout your organization

The financial industry's premier desktop and mobile solution, Eikon is a single, scalable platform that enables you to customize information and embed applications and content to create an integrated, end-to-end solution that fits a wide range of workflows within your organization.

Upgrading your wealth management firm to Eikon can transform productivity and effectiveness. If you have any questions or want to learn more about how Eikon can support your practice, contact your representative or visit [refinitiv.com/en/wealth-management](https://refinitiv.com/en/wealth-management).

Refinitiv is one of the world's largest providers of financial markets data and infrastructure, serving over 40,000 institutions in approximately 190 countries. It provides leading data and insights, trading platforms, and open data and technology platforms that connect a thriving global financial markets community – driving performance in trading, investment, wealth management, regulatory compliance, market data management, enterprise risk and fighting financial crime.

Visit [refinitiv.com/eikon](https://refinitiv.com/eikon)



**REFINITIV®**  
DATA IS JUST  
THE BEGINNING®

