Morgan Stanley

Research Portal

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Research Portal: An Overview

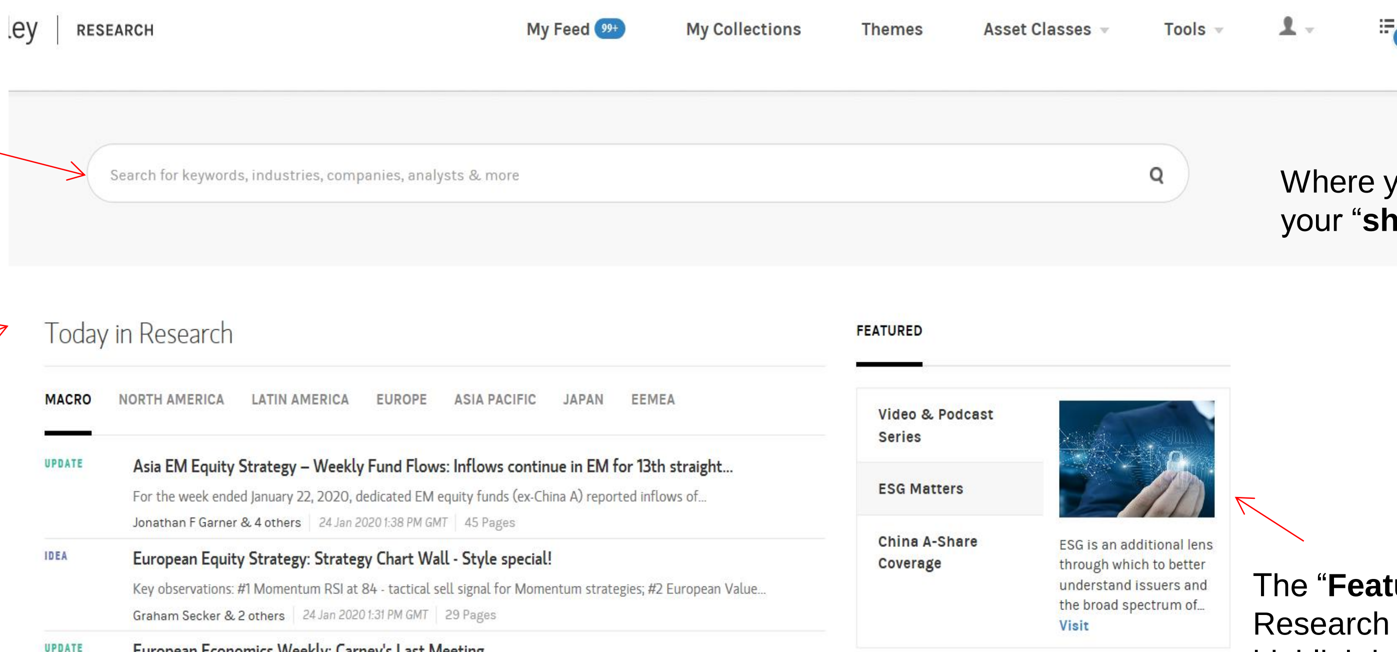
- The Research Portal is our main point of entry for all content related to Research
- You can find anything from an analyst report or model, to a macro forecast, company & analyst pages and the new Risk Reward
- The Research portal is accessible directly, through the Matrix Platform or via links sent to emails. It is heavily used by our clients and our sales force
- In recent years, the Research Portal was redesigned, to better serve the client population and to use the information from our interest models to enhance the content offerings

Research Portal: Basic Navigation

Different tabs that allow you to discover content and extract information

Your **profile**, where you define your preferences and see what you are ‘following”

Use the **search** window to search for reports, models, analysts, collections, etc.



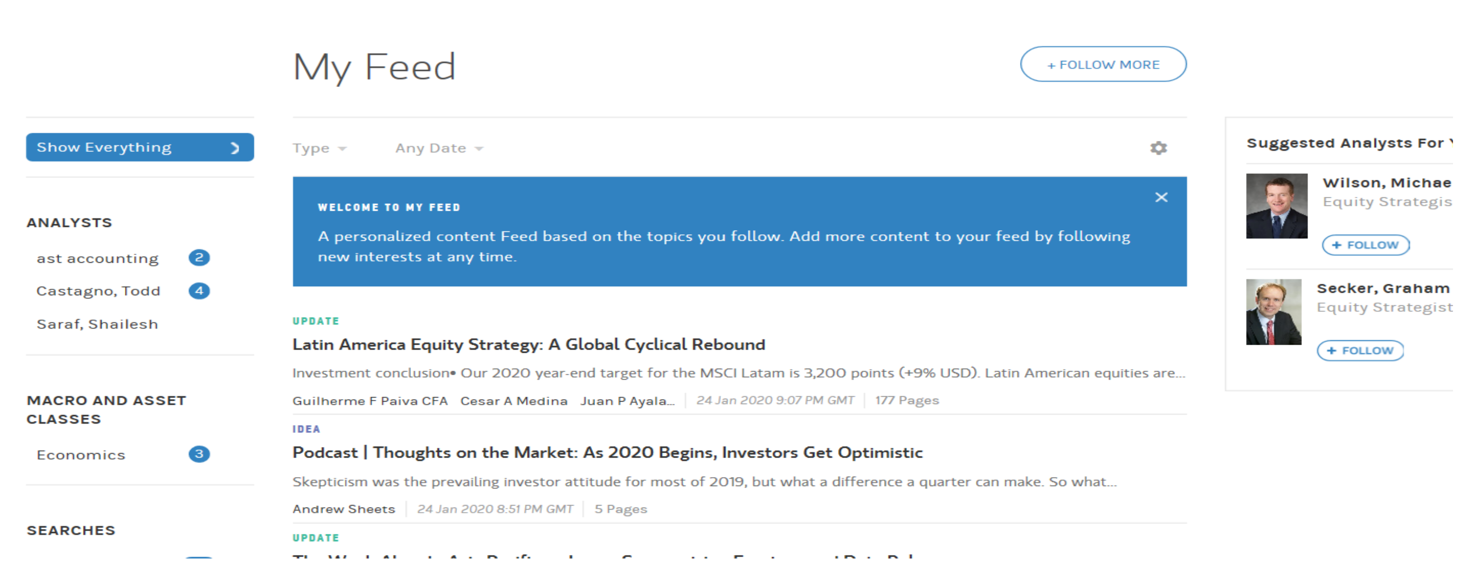
Where you save your “**short** list”

Today in research shows reports discussed in the morning meetings, by region (and Macro)

The “**Featured**” in Research panel, highlighting important research and themes across industries, analysts and regions

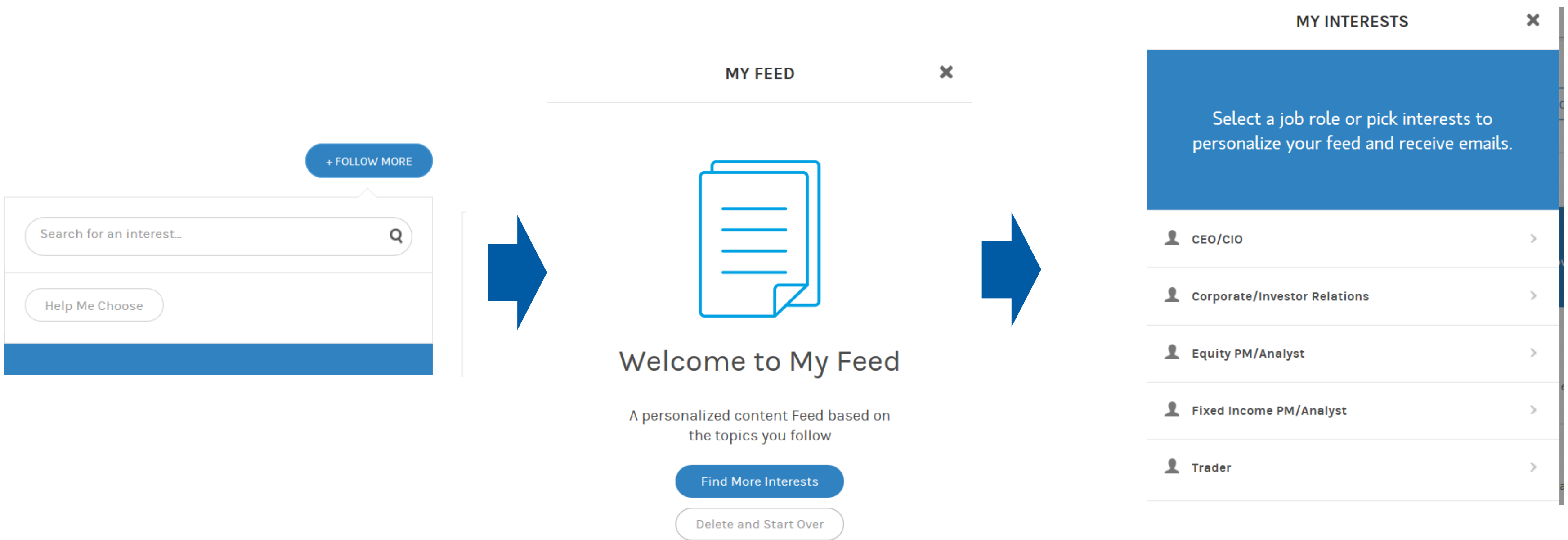
Research Portal: My Feed

- *My Feed* shows the list of reports based on your subscriptions
- On the left panel, you can see the individual subscriptions
- “Follow More” allows you to manage (create & delete) subscriptions using a wizard
- “Suggested analysts for you” are shown on the right hand side panel, based on subscriptions
- You can filter the results by *Type* of content and by *Date*



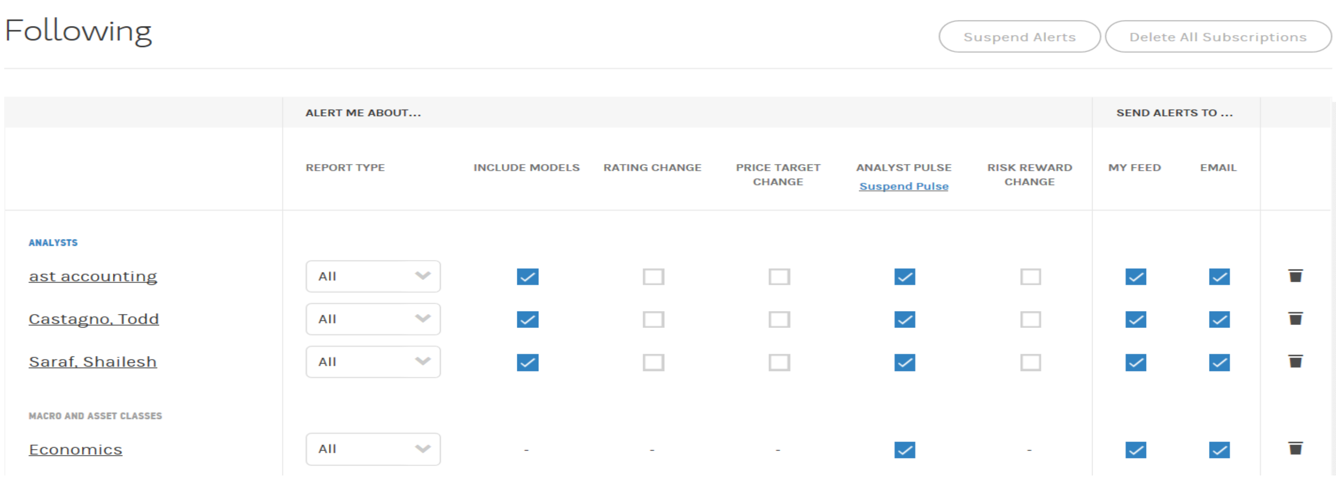
Research Portal: My Feed (cont.)

- Using “Follow more” you can simply subscribe to specific industries or asset classes in specific regions by clicking on “*Help me choose*” button to guide you through the process



Research Portal: Following & Preferences

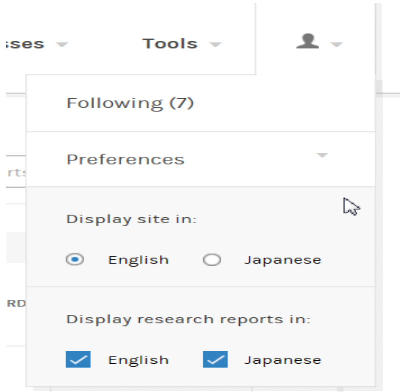
- The *Following* tab shows you what companies, analysts, industries, etc. you are actively following (which will show in your feed)
- You have the ability to filter by report type, if you want to include/exclude models, getting reports that have PT changes/rating changes/ RR changes, include or exclude Analyst Pulses and finally seeing the reports on your feed and/or getting them by email
- You have the option to subscribe to alerts or delete specific or all subscriptions



Research Portal: Following & Preferences (Cont.)

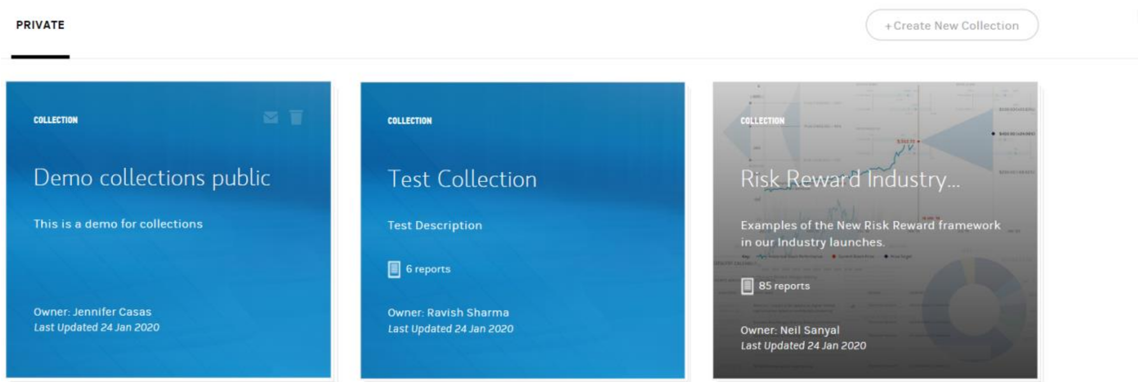
- To add more content based on your criteria, you can do it multiple ways:
  - Click on “follow more” from the “My Feed” page

  - Look for the entities using search and navigate to the entity’s landing page and then click on +Follow there.
- Preferences allow you to set the language of the site and of the reports

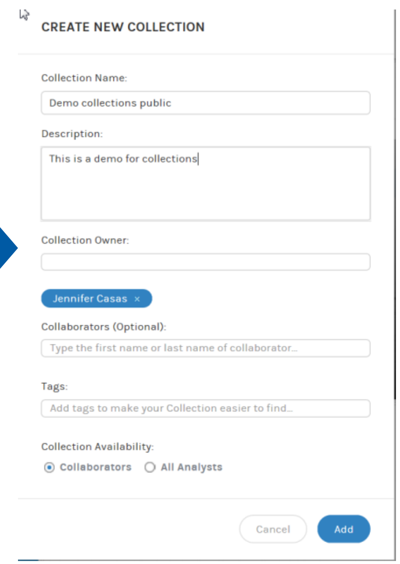


Research Portal: Collections

- Collections are groups of content based on a specific criteria. Collections can be *public* or *private*

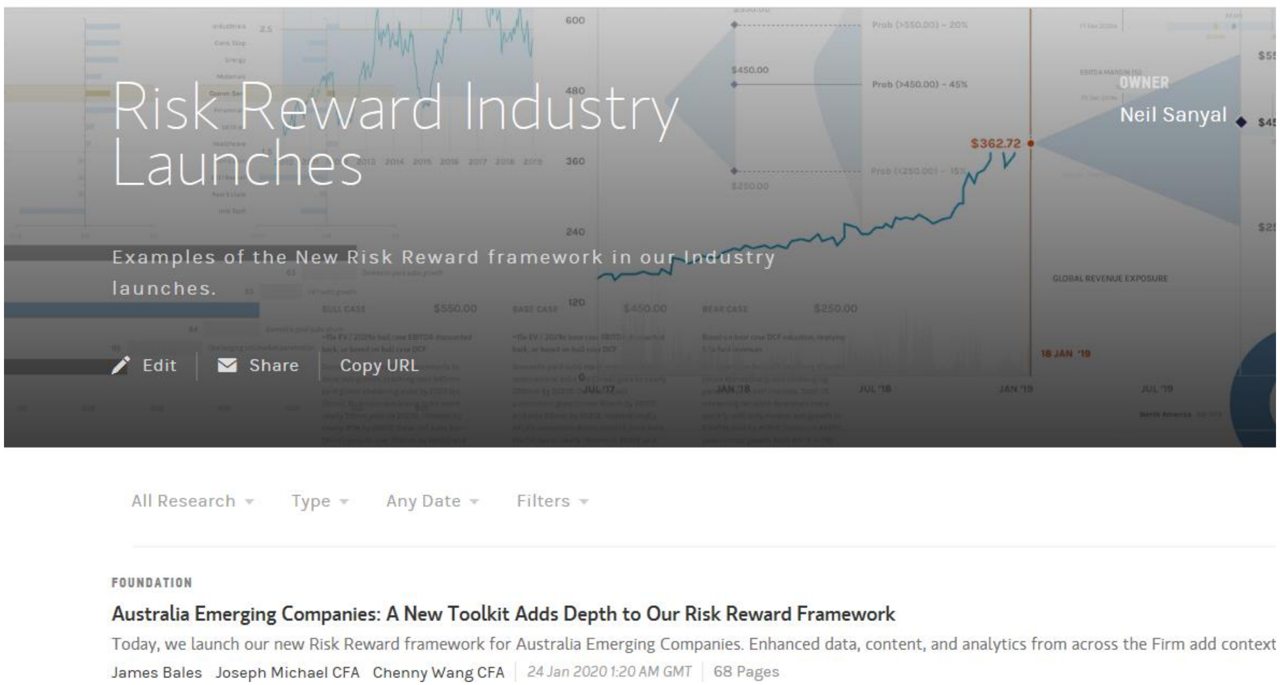


- You can “create new collections” which will trigger a wizard
- You will decide the collaborators, tags, and if the collection is public or private
- Once the collection is created, you can add content to it



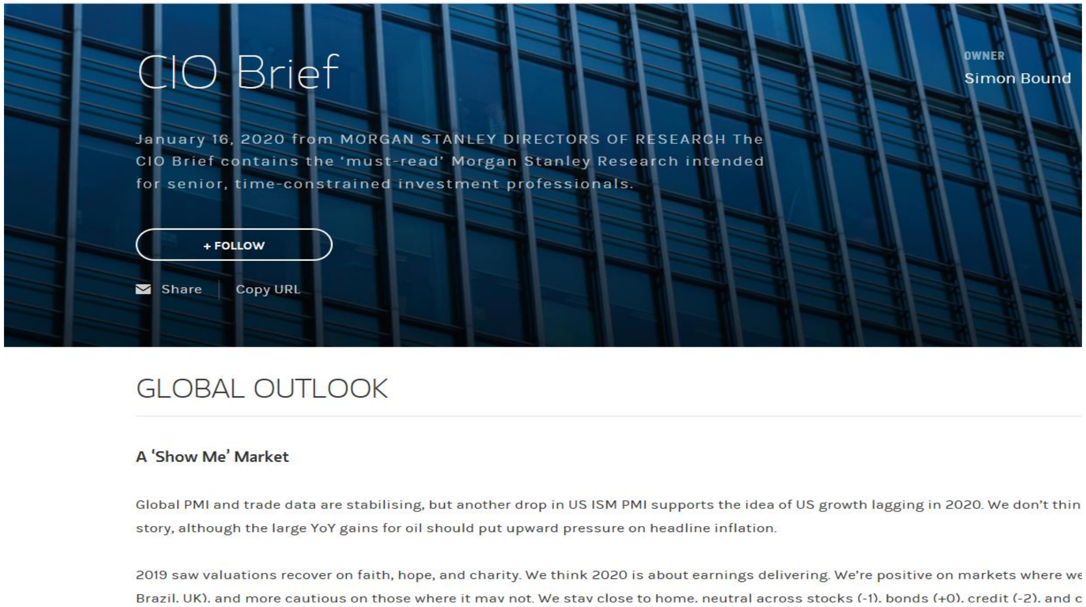
Research Portal: Collections (cont.)

- Collections can also be *basic* or *premium*
  - *Basic* collections are the ones created by Analysts and just show a list of reports
  - You can edit such collection, share via email or send URLs only if a collection is public.



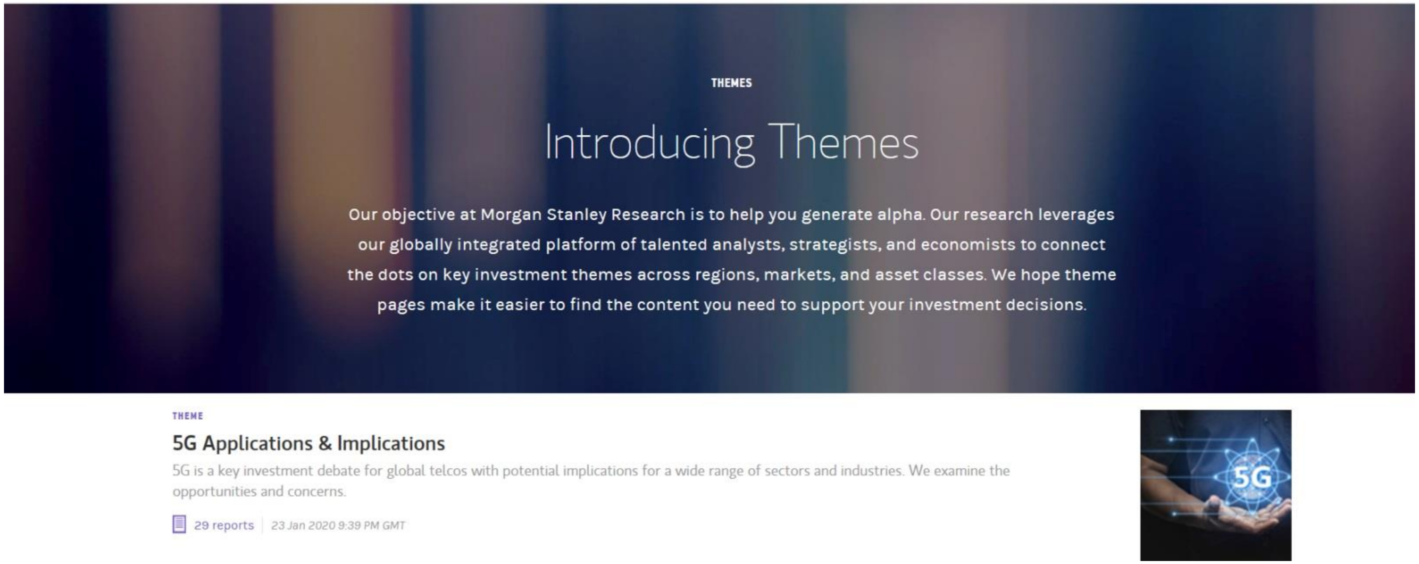
Research Portal: Collections (cont.)

- Collections can also be *basic* or *premium*
  - *Premium* collections are put together by our Marketing team. Analysts can ask to create a premium collection and the Marketing team executes those requests
  - *Premium* collections have a more refined look and feel, with a banner, sections, etc. and they get promoted in the main Research Portal page
  - You can follow these collections, email them or share them via URL



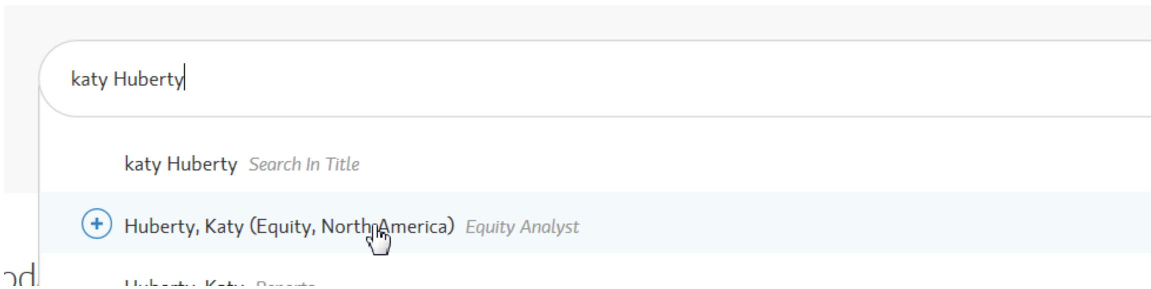
Research Portal: Themes

- *Themes* are group of reports that represent a subject important across the entire Morgan Stanley coverage universe
- The objective of *Themes* is to enhance the investment decision process by highlighting areas of interest to investors
- *Themes* are created and curated by our Marketing team
- Once you drill down on a specific *Theme*, you can follow/email/share URL

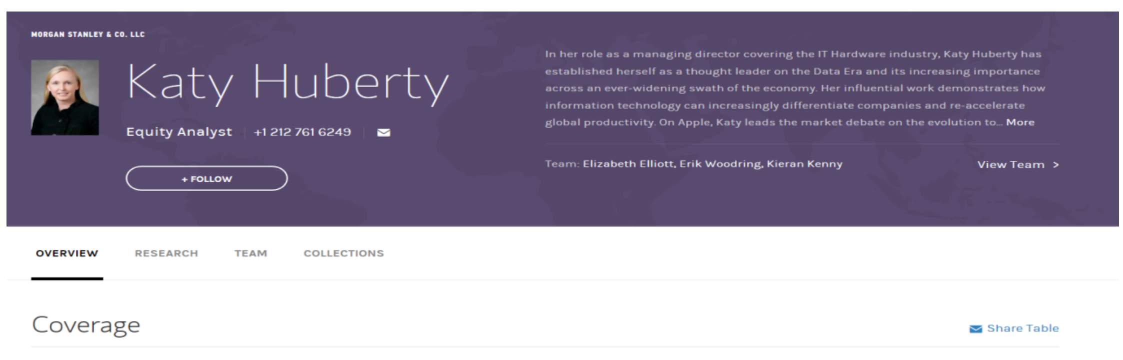


Research Portal: Analyst Page

- To get to the *Analyst page*, type in the Analyst name in the Search window

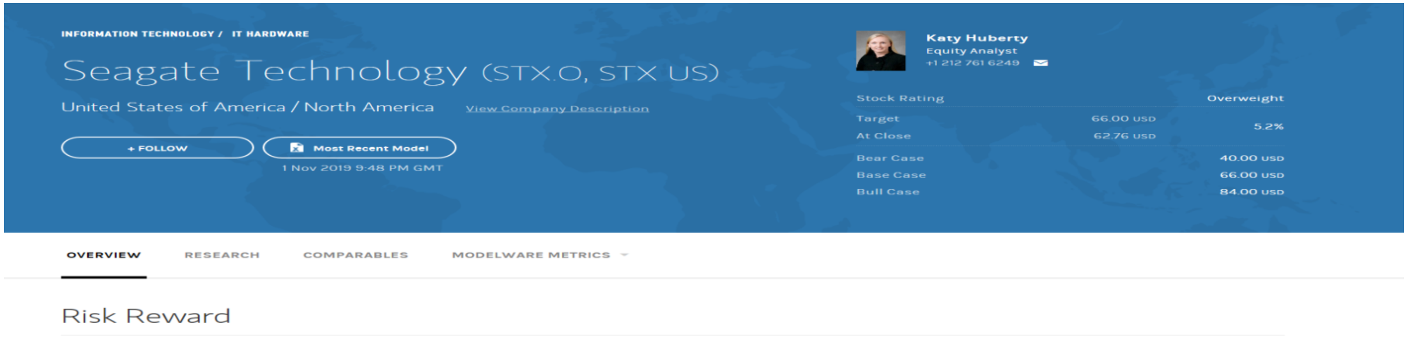


- The page shows the Analyst' coverage along with basic financial ratios, Reports published, members of the team and Public Collections the team has created
- You can follow the Analyst from this page



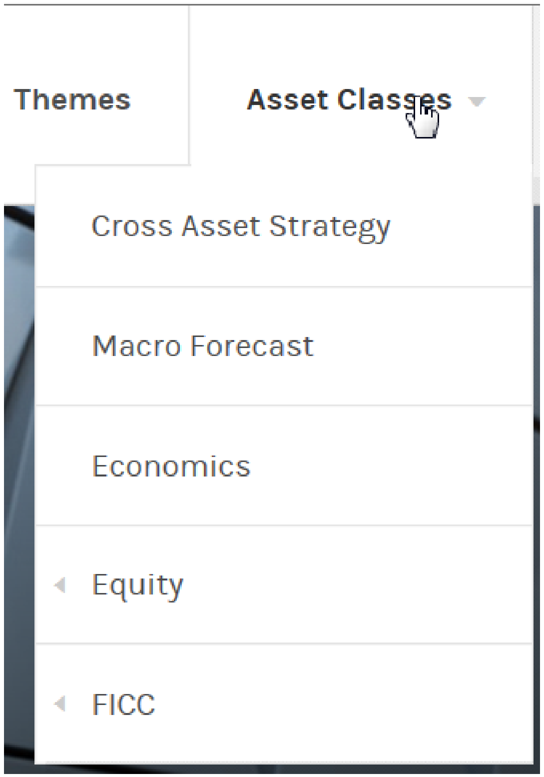
Research Portal: Company Page

- To get to the *Company Page* you can search for the Company on the search bar or select the company from the *Analyst Page*
- The *Overview* tab shows the new RR platform for the stock, along with other key ratios and statistics
- You can also find Reports published on the Company, comparable metrics vs. other companies, and the *ModelWare* page which shows the financial statements and the profitability tree for the Company
- You can follow the Company from this page and also download the most recent published model



Research Portal: Asset Classes

- *Asset classes* shows multiple subgroups of research published by our different teams:
  - *Cross Asset Strategy* show Reports & Teams
  - *Macro Forecast* shows a summary of important macro economic factors (i.e GDP, CPI, Yields, etc)
  - *Economics* shows Reports in the macro area, as well as the macro Catalyst Calendar and the team
  - *Equity* shows Reports in different sub-sections of Equity, alongside the coverage teams
  - FICC shows Reports in differed subsections of Fixed Income alongside the coverage teams



Research Portal: Tools

- *Tools* allows you to discover additional information:
  - The *Alpha Screener* connects you with our Most/Best model
  - *Screener & Analytics* allows to build comp sheets or screen stocks based on a specific criteria
  - *Street events* shows you important events, powered by Bloomberg
  - *Catalyst Calendar* shows you important events for the companies our analyst cover as well as macro-level events. Analysts can follow these events