

Morgan Stanley



**Research Portal**

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## Research Portal: An Overview

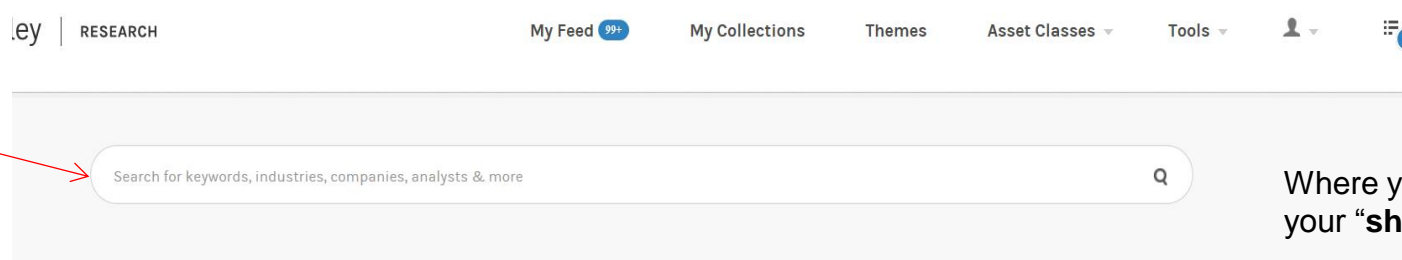
- The Research Portal is our main point of entry for all content related to Research
- You can find anything from an analyst report or model, to a macro forecast, company & analyst pages and the new Risk Reward
- The Research portal is accessible directly, through the Matrix Platform or via links sent 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)

## Today in Research

MACRO NORTH AMERICA LATIN AMERICA EUROPE ASIA PACIFIC JAPAN EEMEA

**UPDATE** Asia EM Equity Strategy – Weekly Fund Flows: Inflows continue in EM for 13th straight...  
For the week ended January 22, 2020, dedicated EM equity funds (ex-China A) reported inflows of...  
Jonathan F Garner & 4 others | 24 Jan 2020 1:38 PM GMT | 45 Pages

**IDEA** European Equity Strategy: Strategy Chart Wall - Style special!  
Key observations: #1 Momentum RSI at 84 - tactical sell signal for Momentum strategies; #2 European Value...  
Graham Secker & 2 others | 24 Jan 2020 1:31 PM GMT | 29 Pages


**UPDATE** European Economic Weekly: Carney's Last Meeting

## FEATURED

Video & Podcast Series

ESG Matters

China A-Share Coverage



ESG is an additional lens through which to better understand issuers and the broad spectrum of...  
[Visit](#)

The "Featured" in Research panel, highlighting important research and themes across industries, analysts and regions

## Research Portal: My Feed

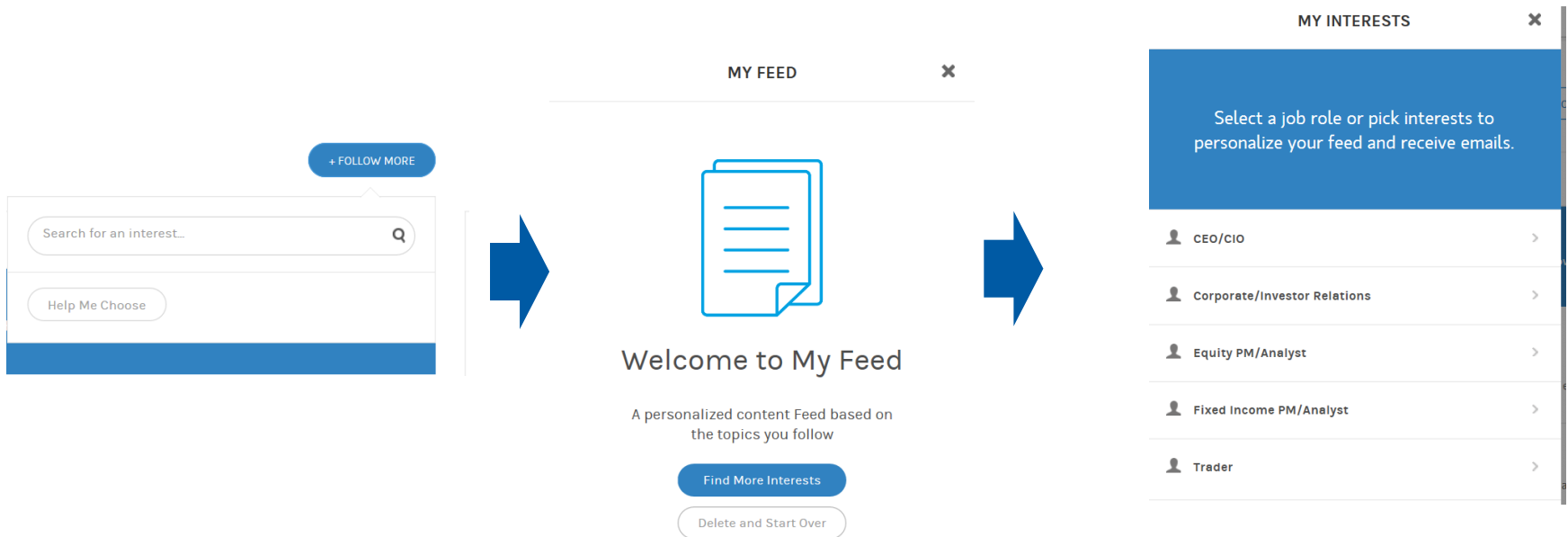
- *My Feed* shows the list of reports based on your subscriptions
- On the left panel, you can see the individual subscriptions
- “Follow More” allows you to manage (create & delete) subscriptions using a wizard
- “Suggested analysts for you” are shown on the right hand side panel, based on subscriptions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

The screenshot displays the 'My Feed' interface with the following components:

- Header:** 'My Feed' title and a '+ FOLLOW MORE' button.
- Filters:** 'Type' and 'Any Date' dropdown menus, and a settings gear icon.
- Left Panel:**
  - Show Everything** button.
  - ANALYSTS:** 'ast accounting' (2), 'Castagno, Todd' (4), 'Saraf, Shailesh'.
  - MACRO AND ASSET CLASSES:** 'Economics' (3).
  - SEARCHES:** (empty)
- Main Content:**
  - WELCOME TO MY FEED:** A blue banner with a close button and text: 'A personalized content Feed based on the topics you follow. Add more content to your feed by following new interests at any time.'
  - UPDATE:** 'Latin America Equity Strategy: A Global Cyclical Rebound'. Investment conclusion. Our 2020 year-end target for the MSCI Latam is 3,200 points (+9% USD). Latin American equities are... Guilherme F Paiva CFA Cesar A Medina Juan P Ayala... | 24 Jan 2020 9:07 PM GMT | 177 Pages
  - IDEA:** 'Podcast | Thoughts on the Market: As 2020 Begins, Investors Get Optimistic'. Skepticism was the prevailing investor attitude for most of 2019, but what a difference a quarter can make. So what... Andrew Sheets | 24 Jan 2020 8:51 PM GMT | 5 Pages
- Right Panel:** 'Suggested Analysts For You' section with:
  - Wilson, Michael:** Equity Strategist, + FOLLOW button.
  - Secker, Graham:** Equity Strategist, + FOLLOW button.

## 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

### Following

Suspend Alerts

Delete All Subscriptions

	ALERT ME ABOUT...						SEND ALERTS TO ...		
	REPORT TYPE	INCLUDE MODELS	RATING CHANGE	PRICE TARGET CHANGE	ANALYST PULSE <a href="#">Suspend Pulse</a>	RISK REWARD CHANGE	MY FEED	EMAIL	
<b>ANALYSTS</b>									
<a href="#">ast.accounting</a>	All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<a href="#">Castagno, Todd</a>	All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<a href="#">Saraf, Shailesh</a>	All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<b>MACRO AND ASSET CLASSES</b>									
<a href="#">Economics</a>	All	-	-	-	<input checked="" type="checkbox"/>	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

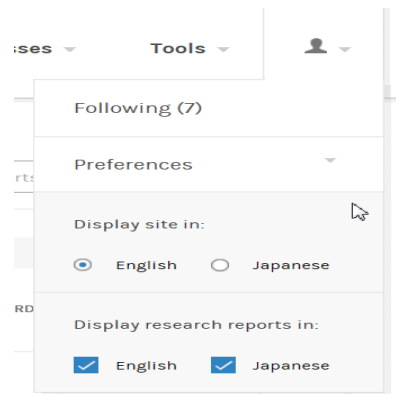
## Research Portal: Following & Preferences (Cont.)

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

My Feed

+ FOLLOW MORE

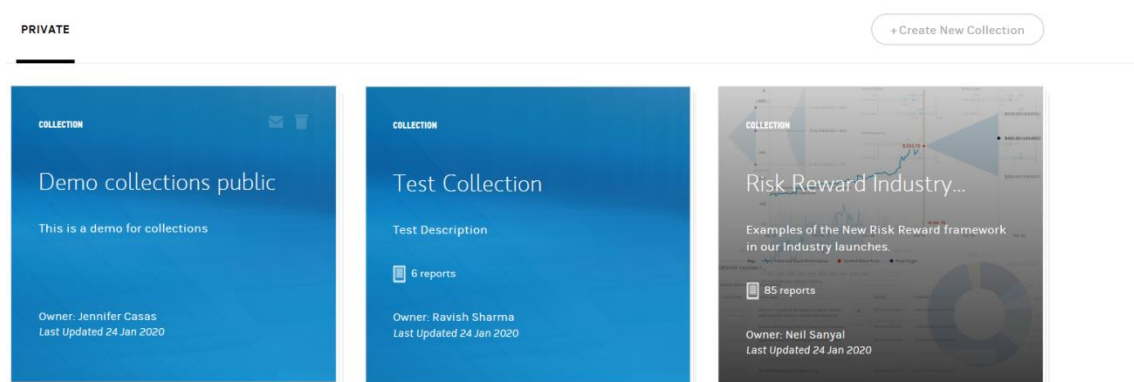
- Look for the entities using search and navigate to the entity’s landing page and then click on +Follow there.
- Preferences allow you to set the language of the site and of the reports





## 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



The 'CREATE NEW COLLECTION' form contains the following fields and options:

- Collection Name:** Text input field containing 'Demo collections public'.
- Description:** Text area containing 'This is a demo for collections'.
- Collection Owner:** Text input field with a dropdown menu showing 'Jennifer Casas'.
- Collaborators (Optional):** Text input field with placeholder text 'Type the first name or last name of collaborator...'.
- Tags:** Text input field with placeholder text 'Add tags to make your Collection easier to find...'.
- Collection Availability:** Radio button options for 'Collaborators' (selected) and 'All Analysts'.
- Buttons:** 'Cancel' and 'Add' buttons at the bottom right.

## 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.



All Research ▾ Type ▾ Any Date ▾ Filters ▾

### FOUNDATION

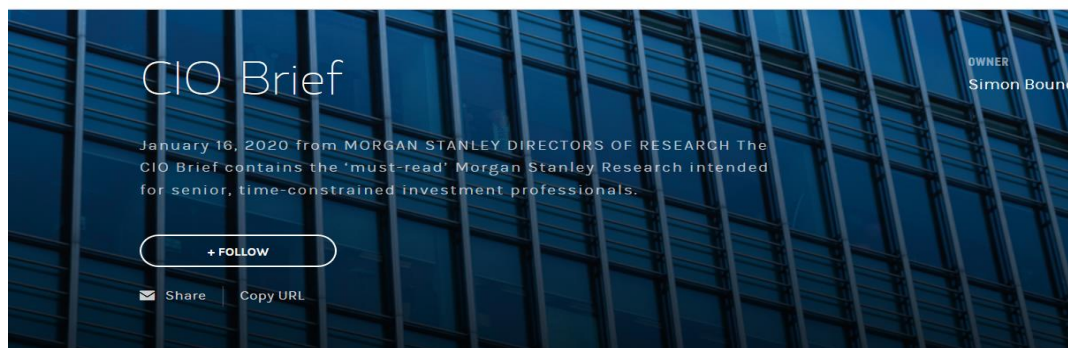
#### Australia Emerging Companies: A New Toolkit Adds Depth to Our Risk Reward Framework

Today, we launch our new Risk Reward framework for Australia Emerging Companies. Enhanced data, content, and analytics from across the Firm add context

James Bales Joseph Michael CFA Chenny Wang CFA | 24 Jan 2020 1:20 AM GMT | 68 Pages

## 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



### GLOBAL OUTLOOK

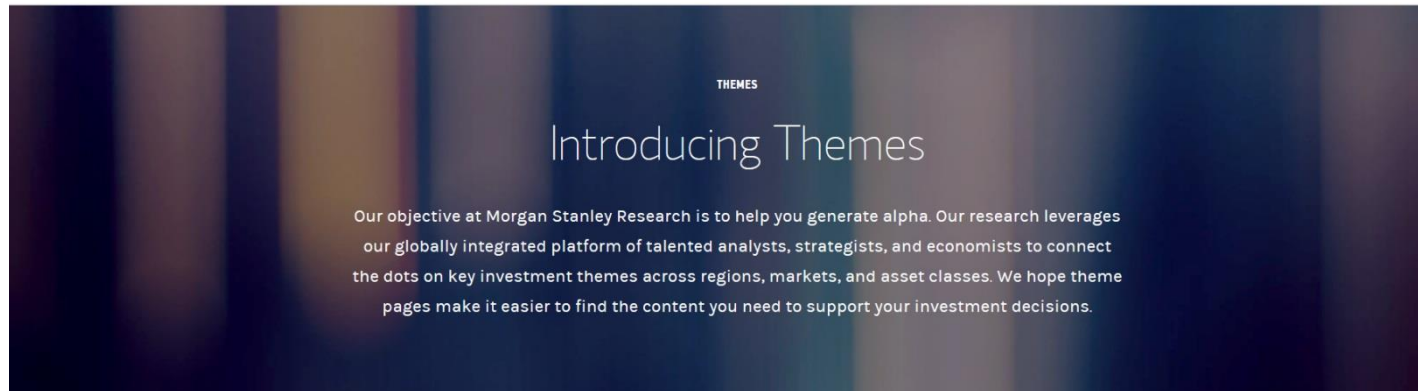
#### A 'Show Me' Market

Global PMI and trade data are stabilising, but another drop in US ISM PMI supports the idea of US growth lagging in 2020. We don't think story, although the large YoY gains for oil should put upward pressure on headline inflation.

2019 saw valuations recover on faith, hope, and charity. We think 2020 is about earnings delivering. We're positive on markets where we Brazil, UK), and more cautious on those where it may not. We stay close to home, neutral across stocks (-1), bonds (+0), credit (-2), and c

## 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



THEME

### 5G Applications & Implications

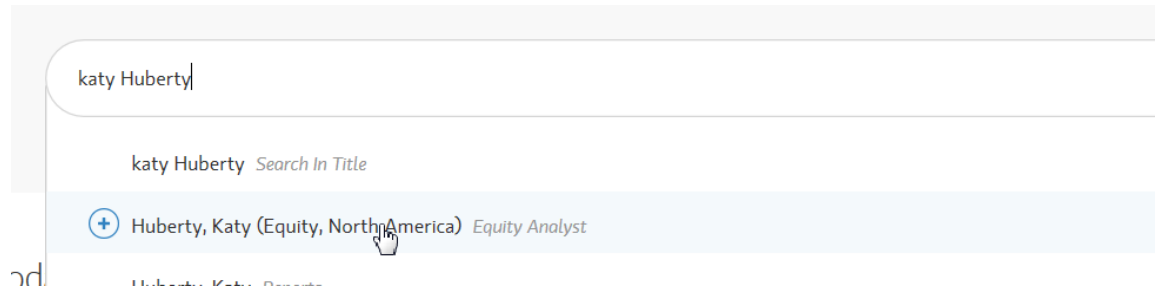
5G is a key investment debate for global telcos with potential implications for a wide range of sectors and industries. We examine the opportunities and concerns.

29 reports | 23 Jan 2020 9:39 PM GMT

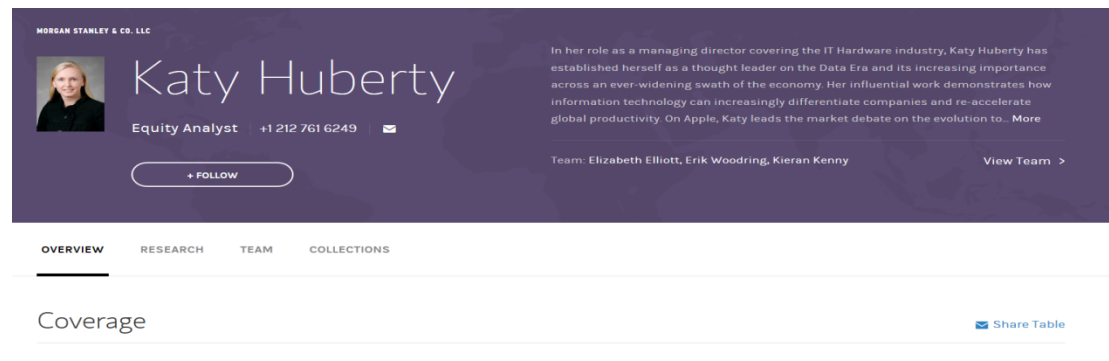


## Research Portal: Analyst Page

- 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

INFORMATION TECHNOLOGY / IT HARDWARE

Seagate Technology (STX.O, STX.US)

United States of America / North America [View Company Description](#)

[+ FOLLOW](#) [Most Recent Model](#)  
1 Nov 2019 9:48 PM GMT

**Katy Huberty**  
Equity Analyst  
+1 212 761 6249

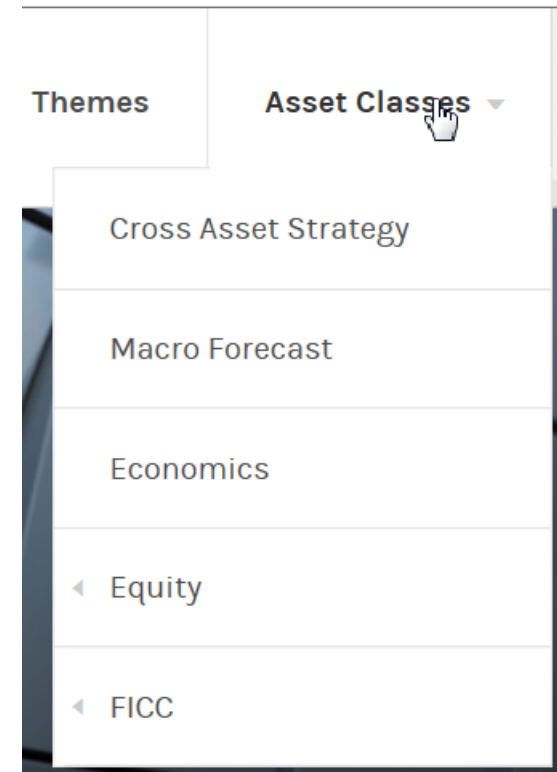
Stock Rating	Target	Overweight
At Close	66.00 USD	5.2%
Bear Case	62.76 USD	
Base Case		40.00 USD
Bull Case		66.00 USD
		84.00 USD

OVERVIEW RESEARCH COMPARABLES MODELWARE METRICS

Risk Reward

## 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

