

# Nasdaq Advisory Services

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Nasdaq Corporate Solutions helps IR professionals maximize the effectiveness and value of their IR programs with the most comprehensive, integrated workflow solutions, saving time and driving results.

With data from more than 18,000 companies, our clients rely on the expert insight of our Advisory specialists to help them gain a comprehensive understanding of institutional shareholders and their decision-making processes.

## Advisory Services Benefits:

- **Global perspective**

Nasdaq Advisory Services is the only provider with clients across all sectors and regions

- **Industry knowledge and expertise**

Our clients receive focused analyses from our team of analysts, who average 13 years of market experience and 10+ years in Advisory with sector and geography expertise

- **Exceptional insight into buy-side decision making**

Our clients gain unique insight into the decision making process to understand the “why”, not just the “who”

- **Real-time analytics**

We apply cutting-edge big data analytics to dynamic and rich data visualization dashboards that deliver real-time ownership and premium Advisory Services targeting intelligence and risk management

- **Premium content integrated with Nasdaq IR Insight™, the integrated workflow solution for the investor relations professional**

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UNDERSTAND HOW YOUR COMPANY IS PERCEIVED IN THE MARKETPLACE WITH DIRECT FEEDBACK FROM KEY CONSTITUENTS

## Equity Surveillance and Shareholder Identification

- Understand investor opportunities and risks
- Leverage the largest private ownership database from our global team of experienced analysts who cover all major industries
- Deep and unbiased insight using proprietary models to provide unique views of your stock and ownership

## Investor Targeting

- Identify key investors and understand behavior and trading activity
- Understand how global macroeconomic developments and buy-side decisions impact the performance of your stock, peers and sector
- Tell the right story to the right investors, analyze meeting effectiveness and tailor your use of cash

## Perception Studies

- Understand how your company is perceived in the marketplace with direct feedback from key constituents
- Develop a quantitative and qualitative interview framework infused with best practices and targeted to your needs
- Enhance your company's perception and investment profile with insights and recommendations, including peer benchmarking

## Activism Practice

- Reverse-engineer the activist screening process to identify the fundamental metrics and profiles which make clients susceptible to shareholder activism
- Map specific profiles of individual activist investors and proactively identify those investors most likely to engage in your stock
- Understand real-time shareholder movements by a tenured activist-focused analyst, with ongoing insight into derivative exposure

## Tax & Regulatory

- Unmask tax benefits and identify your exposure to regulatory scrutiny
- Properly implement your tax strategy and compliance programs
- Proprietary Ownership database includes shareholder data resources and our exclusive relationships with the investment community, including 1,000+ institutions

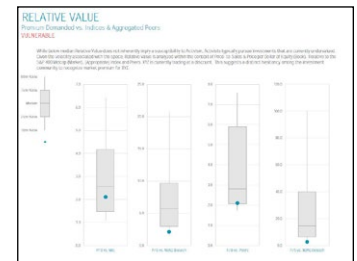
## Fixed Income Identification

- Comprehensive bondholder analysis on the secondary market provides a view of current bondholders on single or multi issue level
- Vast database of institutional contacts to help maintain communication with bondholders

### Equity Surveillance & Shareholder Identification



### Investor Targeting



### Perception Studies



### Activism Practice

