

LSEG Workspace

For Portfolio Managers



LSEG DATA & ANALYTICS

Outperform using insights that drive investment ideas and identify risk exposures

Portfolio Managers strive to provide an excellent service to their clients in calm and volatile markets, identifying new opportunities and analysing market trends. Given ongoing market volatility, delivering outstanding risk-adjusted returns versus the benchmark, remains a challenge.

LSEG Workspace enables portfolio managers to identify opportunities, balance risk exposure, and keeps them well informed about their target companies and fund managers. We offer an unrivalled breadth and depth of data – covering all major product types with detailed knowledge on company and fund fundamentals and estimates to industry and macro data, StarMine analytics and ESG metrics.

Read timely news and event alerts that impact your portfolio

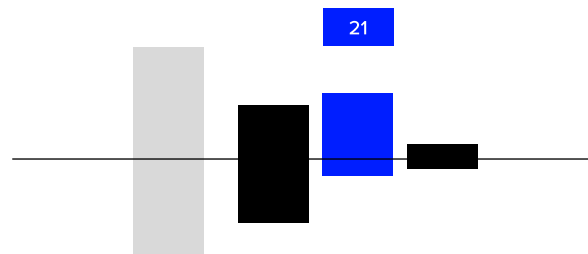
Filtering out the noise is crucial to understand what news and announcements are relevant. Workspace sends timely alerts and insights, ensuring you don't miss anything important.

- Stay on top of company and macro developments with breaking news from Reuters – exclusively available to the financial community through LSEG, plus 10,000+ relevant news sources
- Receive all the alerts you want to see instantly on your mobile devices so you know what is happening in the market and can quickly decide if you need to dive deeper
- Cut through the noise with LSEG Digest's relevant and curated news for the markets, companies and regions, delivered directly to you in an easy-to-read format
- Use Watchlist Pulse to get a consolidated view of news, events, new corporate filings, upcoming events and StarMine analytics that help surface trends and inflection points for your target companies
- Monitor developing trends with our Earnings Season app as companies report

Quickly develop a differentiated view and evaluate new ideas

Develop a differentiated view from idea generation to opportunity analysis and modelling. Assess your team's ideas or discover new ideas with the help of our macroeconomic and company data, differentiated analytics and screeners.

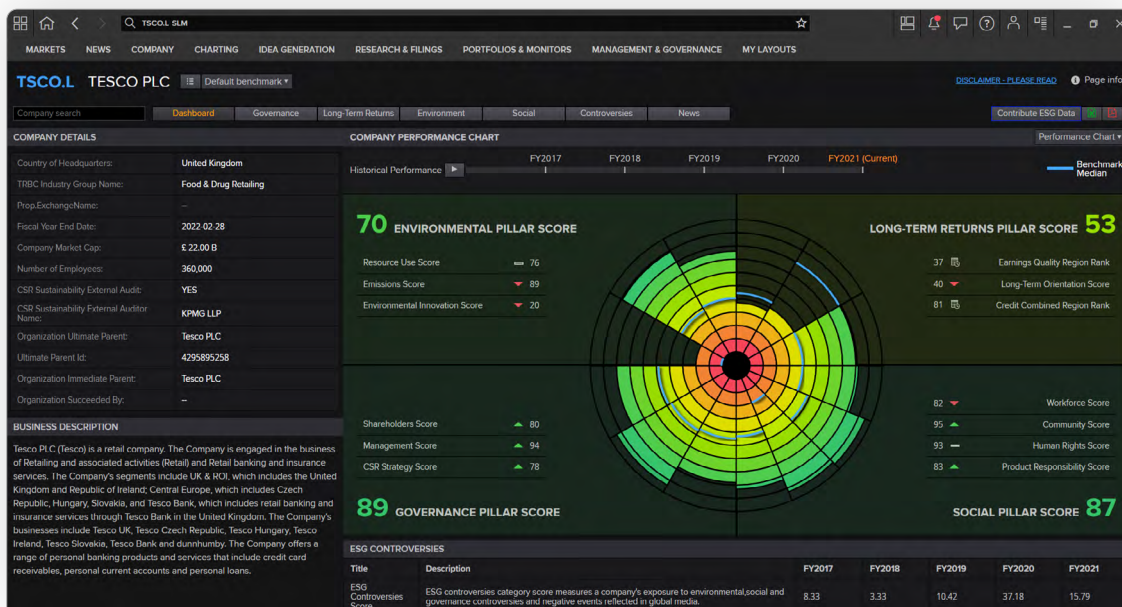
- Challenge the market consensus with StarMine proprietary predictive analytics, including, SmartEstimates®, Bold Estimates, analysts' revisions as well as intrinsic and relative valuation models
- Review industry KPIs and macro factors that affect companies of interest – across margins, sales numbers and supply inputs to inflation, unemployment, commodity prices and consumer sentiment
- Access research from 1,300 leading brokerage firms and independent providers, including Datastream's comprehensive data and visualisations on 16.5 million indicators
- Monitor changes to convictions impacting your clients' portfolios and Streamline the distribution of in-house and external research, convictions lists, and model portfolios with our House Views and Market Insights (HVM)



Integrate sustainability into the investment process

Workspace helps build portfolios that meet investor mandates, uncover sustainability-related risk and report on any aspect of a portfolio's ESG profile.

- Uncover trends with Country SDG Scores that measure a country's relative performance across each of the United Nations' 17 Sustainable Development Goals
- Deconstruct a company's ESG score to manage risk and improve investment outcomes with over 630 data points and 70 analytics – backed by auditability to source documents – covering over 85% of global market cap
- Assess country ESG performance and identify ESG factors that impact country economic growth via Beyond Ratings ESG Factor-In data. Use it to integrate ESG considerations in sovereign bond investments, including active portfolio management and ESG reporting
- Understand country exposure to and management of climate issues across the themes of carbon footprint, energy transition and physical climate risks with Beyond Ratings Sovereign Climate KPIs
- Aggregate and report ESG metrics for your portfolio, including attribution reporting to test how an ESG tilt is impacting performance
- Address regulatory and investor demands for ESG disclosure and reporting with a Sustainable Finance Disclosure Regulation (SFDR) template for portfolio-level aggregation as well as a Carbon Intensity template in our Portfolio Analytics app

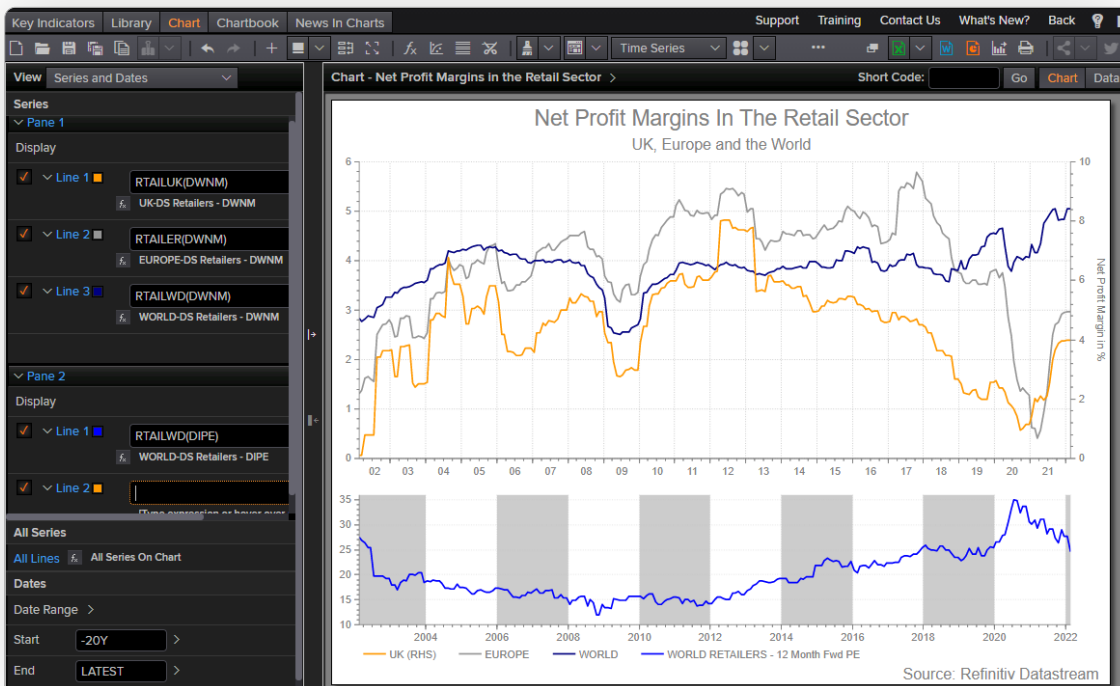


Identify ESG risk factors in the companies you cover with easy access to over 400 data points and 70 analytics.

Enrich your research with value-added content and visualisations

With Portfolio Analytics in Workspace, you can fully understand portfolio performance and risk for multi-asset class portfolios to facilitate client discussions- including drivers of absolute and relative performance, asset allocation, top/bottom performers and ESG metrics.

- Analyse multi-asset class portfolios including cross-asset attribution, contribution, performance and style analysis
- Better understand a portfolio's performance by identifying primary drivers of absolute and relative performance at sector and security levels
- Monitor and report risk for multi-asset class portfolios. MSCI's RiskMetrics provides risk analytics including parametric, historical simulation and Monte Carlo Value-at-Risk methodologies, as well as market exposure and sensitivity analysis
- Stress-test portfolios to assess the potential impact of economic scenarios with MSCI's RiskMetrics – including historical and custom scenarios calibrated for shocks in equity markets, currencies, commodities and interest rates
- MSCI Barra's Optimiser in Workspace combines a powerful optimization engine with LSEG's industry leading content, leveraging MSCI's multi asset risk model to help investment managers demonstrate a more quantitative approach to Portfolio Construction to reduce tracking error and minimise risk



Quickly review sector performance with deep industry timeseries data and powerful visualisations.



About LSEG Workspace

LSEG Workspace gives you access to the broadest and deepest coverage of financial data, news, analytics and productivity tools – all in a highly customised experience on desktop, web and mobile.

LSEG Workspace has been designed to improve productivity at every step of the sell-side analyst workflow.

We have built a smart, real-time financial market search facility that returns highly relevant results with minimal input. Our artificial intelligence algorithms become smarter the more you use them, learning your usage patterns to generate the right results.

