

LSEG WORKSPACE

SERVICE DESCRIPTION



LSEG DATA &
ANALYTICS

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About this document

Intended readership

This document is available for current and prospective customers of LSEG Workspace®.

In this guide

This document describes the service that customers of LSEG Workspace can expect, alongside the experiences and options designed within the service. It is not a legally binding document but is intended to give a reasonable expectation of the service you will receive as a customer of LSEG Workspace.

You should refer to this document for any information about the service included with LSEG Workspace, whether as a prospective or ongoing customer. If you have any further questions, do not hesitate to contact your Account Team.

Privacy

Your privacy and trust are important to LSEG. See our [Privacy Statement](#) for more information.

About LSEG Workspace

With LSEG Workspace, you can quickly uncover hidden opportunities using our comprehensive data and unique content.

Highly visual and intuitive to use, LSEG Workspace is the ultimate set of financial analysis tools. Integrate multiple workflows, co-create applications, and communicate with other financial professionals to make better decisions.

We do not operate on a one-size-fits-all model. Whether you are a start-up or a large corporate, we can help you find the relevant level of content and features that suits your needs.

LSEG Workspace is available on Microsoft® Windows® and Apple® macOS®, and in a browser.

LSEG Workspace products

Different firms and different roles require different content, tools, and workflows. LSEG offers a range of products that have been created to suit the needs of specific users.

For more information, speak to your Account Team.

Discover

To find out more about how LSEG Workspace can help you, speak with your Account Team.

You can also find more information about LSEG Workspace on the [Workspace section](#) of the authenticated website.

Purchase and renew

Ordering LSEG Workspace

New customers should request a LSEG Workspace license through their Account Team. If you do not know your Account Team you can [Contact Us](#) and we will make sure you get to the right person. Thereafter, customer administrators can order additional applications using License Management tools on the [Workspace section](#) of the authenticated website. Training for customer administrators is available on our [Training Site](#). If a customer is not set up to order additional applications through the [Workspace section](#) of the authenticated website, they can request additional licenses through their Account Team.

Purchasing additional application

Purchasing LSEG apps

LSEG applications are not available for purchase individually but are packaged into propositions based on user workflows. LSEG Workspace contains all the available LSEG applications. Your Account Team is available to discuss the best proposition to suit your individual needs. By purchasing a license for LSEG Workspace you can access LSEG Workspace through a desktop application, web portal, and mobile device. In this document, these are referred to as LSEG Workspace desktop access, LSEG Workspace web access, and LSEG Workspace mobile access, respectively.

Purchasing additional content

You can purchase additional LSEG and partner content by requesting it from your Account Team. You can find a catalogue of content available for purchase in the Content Kiosk application in LSEG Workspace. The Content Kiosk app is available in the App Library or by searching 'Content Kiosk'.

Billing

You are billed according to the billing frequency specified for your account. Some partner services will bill you directly based on their own billing rules. For more details, you should contact your Account Team.

User maintenance

There are various situations where changes need to be made to a license namely:

- Purchase (product and add-ons)
- User swap
- Assign/unassign licenses
- User detail changes
- Cancellation
- Relocation

To make these changes, contact your Account Team directly.

Renewals and cancellations

For details on renewal and cancellation terms, you should contact your Account Team.

Setup

Deployment

LSEG offers customers different methods of deploying LSEG Workspace. Requirements vary by user communities, and the deployment LSEG Workspace can be tailored to meet those needs. Contact with your Account Team to discuss which deployment method is most suitable.

LSEG hosted

All infrastructure sits with LSEG, and LSEG Workspace connects to real-time data and all other services through either the Internet or private lines.

Customer managed

Infrastructure, such as data feeds and a Market Data distribution service like Real-Time Distribution System (RTDS), sits on the customer site. LSEG Workspace connects to real-time data locally, and all other services through either the Internet or private lines.

Installation and onboarding

Windows and macOS desktop

LSEG Workspace is available using a simple [download](#) and installation. The basic Installation instructions are available [here](#). For more complex, multi-user installations, refer to the advanced guide, found [here](#).

Installation does not require administration rights on the user's computer when installed per user. It is possible that a customer's security settings may be such that administration rights are required to install any applications, but the framework itself does not require them.

System requirements

LSEG Workspace requires some specific [System Requirements](#). You should consider all requirements of any other applications that you plan to run alongside LSEG Workspace.

Installation support

Frontline support is available 24 / 7. Installation escalation teams are available 24 hours a day, Monday – Friday.

LSEG Workspace web access

LSEG Workspace Web Access requires no installation, but we must meet some basic [System Requirements](#).

LSEG Workspace mobile access

LSEG Workspace Mobile Access requires the user to download the app from their supported official app stores, that being the iOS® App Store.

- ① Users must meet some basic hardware requirements. For more information, see the [System Requirements](#).

Single sign-on

For some combinations of LSEG Workspace Variant and Deployment Method we offer Single Sign-on (SSO) capabilities based on Security Assertion Markup Language (SAML) 2.0. This allows your IT administrator to set up SSO authentication between the Identity Provider (IDP) and the Service Provider (SP) using the SSO Administration Console.

Welcome emails

Users will receive a welcome email containing links to their login credentials and to the product download page. The links are unique to each user and will let the user set their password and download or access LSEG Workspace. Welcome emails are generated automatically.

Welcome emails can be delivered in the following languages:

- English
- Simplified Chinese
- Japanese

Profile information

When you start LSEG Workspace for the first time, you will be welcomed with our essential onboarding flow. The aim of this flow is to ensure we have all the information we need to customize LSEG Workspace to your needs.

During essential onboarding, you will be asked to enter profile information. This includes job role, asset classes (if relevant to your role) and the selection of your primary asset class. LSEG will use this information to make it easier for you to find the features and functionality that are important to your workflows.

We will then ask you to check, and change if required, some basic settings. These settings include:

- Workspace language – Your preferred language for the Workspace interface. You can choose from three supported languages:
 - English,
 - Simplified Chinese, or
 - Japanese

If changed, these changes will take effect on next sign-in to Workspace

- Languages for Content – The languages in which content for news, research and more are delivered in Workspace. You may select more than one language.
- Location for Search – This provides a focus for search results, giving higher priority to local terms. For example, searching 'BP' with Italy selected as your preference may give a higher priority to Banco Populaire over British Petroleum.
- Colour theme – Select from either a light or a dark theme.

- Instrument movement selection – This governs the colour templates for instrument movement (for example, tracking up/down shifts within Monitor or Chart). You can select from four templates: American, European and Asian 1 & 2

Finally, we will ask you to set up an email address for receiving alerts in Workspace. You will need to verify this email (if setting up for the first time or changing it from an existing email) within 48 hours to receive alerts to that address. We will not send you any alerts emails until you set up your first alerts within Workspace.

You may change any of these selections at any time in Workspace Settings or, for alerts emails, the Alerts application.

Only LSEG Workspace desktop access and LSEG Workspace web access support the first-time profile setup process. We recommended that you start with these platforms before logging into the mobile app.

Successful installation

A successful installation has been completed after downloading, installing, and signing in to LSEG Workspace. After a successful installation, an 'Installation is complete' message will display.

Product usage

LSEG Workspace is an individual information service for the use of the licensed user only.

Detailed information on allowed usage can be found in your contract. The usage of interactive services is covered in the [Code of Business Conduct & Ethics](#).

If you have additional questions, contact your Account Team.

Product languages

LSEG Workspace can be delivered in the following languages:

- English
- Chinese
- Japanese

You can change your preferred language on the sign-in screen, and through Settings.

General security

As the world's largest financial information source, LSEG is serious about safeguarding the security and quality of all the proprietary and third-party information that flows through our systems. Therefore, we have taken steps to formalize and embed the information security management and quality management systems into the Information Technology Infrastructure Library (ITIL®) service management processes operated in our major data centers – including attaining certifications in two industry-proven global standards ISO 9001 (Quality Management) and ISO 27001 (Information Security Management).

More information can be found in our [Statement of Service](#).

How personal data is used within LSEG Workspace

LSEG Workspace makes available a large number of finance-related external and LSEG data sources and products. Users search these sources and products and can save the results of these searches as shortcuts/preferences.

LSEG Workspace also uses data in word search terms entered by individual users and stores them to enable the product to suggest previous search terms to enhance user experience. LSEG Workspace collects and stores data relating to how and which users interact with the product (in other words, source/internal product hits, user job functions, locations, and asset classes), for the purposes of tailoring the discoverability of applications and menus, as well as for support purposes.

For more information, contact your Account Team.

Business Continuity (BC) and Disaster Recovery (DR)

LSEG Business Continuity Management Office (BCMO) maintains a [business continuity policy](#). For further information, contact your Account Team.

There are no options for customers to select levels of services for LSEG Workspace. By nature, any Hosted LSEG Workspace product can be accessed using any Internet Connection. User profiles, favourites, workspaces, and preferences are all stored centrally so can be accessed from anywhere. LSEG provides data center redundancy and failover. It is

the responsibility of the customer to obtain the correct level of service from their ISP to meet their own connectivity resiliency needs.

Information security

LSEG is committed to its Information Security program, the mandate of which is approved by the Executive Committee. We have a Chief Information Security Officer and an extended team of security specialists, spread across the globe, dedicated to the security of LSEG Financial and Risk products and services.

Our commitment to security is achieved through the application of demonstrable security controls at an appropriate level to the service being offered. Furthermore, our security strategy ensures that appropriate security controls exist within service design and operation. This is to counter the threats to the confidentiality, integrity, and availability of customer information which we store, process, or transmit.

We have staff trained to identify issues and resolve them as quickly as possible with minimal impact on customers. Our involvement in industry and government security forums and groups further demonstrates our proactive approach to understanding and countering the threats we face.

Legal and regulatory

LSEG global legal department will interpret the laws and regulations that apply in the countries where we operate and provide appropriate policies to enable us to comply with them.

We have implemented a publicly available [Code of Conduct](#), to provide guidance and advice on how to report ethical, legal, and policy issues.

Communications

External communications for release notes, new versions, product road maps, product maintenance schedules, alerts, content change notifications and documentation (training and user guides) updates are available through the [Workspace section](#) of the authenticated website and, if necessary, through your Account Team.

Security patches

Any security issue will be assessed immediately upon detection. A software patch will be made available as soon as a solution is identified and implemented. For any issue where LSEG is reliant on a third party for a solution, communication to customers will be delivered through the [Workspace section](#) of the authenticated website.

Help and support

Finding answers to questions and getting technical support is easy with LSEG Workspace. Users can get help by:

- Typing 'Help' in the search field and selecting 'Help & Support'
- Clicking 'Contact us' from the Help menu, and selecting 'Get Help & Support'
- Selecting "Get Support" from any app menu

Customers and users can also contact LSEG directly from the [Workspace section](#) of the authenticated website.

Languages and availability

Live chat

Live chat is a real-time support channel that we offer to all LSEG Workspace users but is not available in LSEG Workspace Mobile. You can access this by choosing 'Get Help & Support' from the Help menu in LSEG Workspace. Live Chat is available in English on a 24 / 7 basis.

Local language support is available during local business hours in the following languages:

- Japanese
- Mandarin

Customer support

Customer support delivered by phone and email is available in the Help & Support app in the product and will be delivered in English on a 24 / 7 basis.

Local language support is available during local business hours for the following languages:

- Arabic
- Thai
- Cantonese
- Turkish
- French
- Vietnamese
- German
- Greek
- Indonesian Bahasa
- Italian
- Japanese
- Korean
- Malay
- Mandarin
- Polish
- Portuguese
- Russian
- Spanish

Resolver groups

Resolver groups are used when an issue needs escalation for further investigation. They will deliver support in English only.

Training and documentation

Training is also available from [Refinitiv Training](#), and relevant documentation can be found on the [Workspace section](#) of the authenticated website.

You can also request training by choosing 'Get Help & Support' from the Help menu in LSEG Workspace.

Feedback and continuous improvement

LSEG is committed to continuously improving its products and support. After interacting with a product or an employee of LSEG, customers may receive an opportunity to give their feedback or learn more, either in-product or by email.

Users of LSEG Workspace can also give feedback at any time from the Feedback app available within both the Desktop and Web access versions.

Users can access the Feedback app by:

- Typing 'Feedback' in the search field, or
- Clicking 'Contact us' in the Help menu and selecting 'Feedback & Feature Requests'

CodeBook and LSEG Workspace APIs

CodeBook and LSEG Workspace APIs provide a powerful open environment for financial coders and developers wanting to leverage the full potential of LSEG Workspace programmatically. This section provides more details about the relevant capabilities and outlines the customized support model.

What is CodeBook?

CodeBook is a LSEG Workspace app that provides a ready to use, zero-footprint development environment hosted in the cloud. CodeBook is fully integrated into the LSEG ecosystem (LSEG Workspace, LSEG Data Platform, and so on). It includes productivity tools that help you when writing code, in terms of retrieving and using LSEG data. CodeBook is preloaded with popular APIs and software libraries including LSEG APIs.

LSEG Workspace APIs

LSEG provides several APIs and software libraries that you can use to retrieve data from both LSEG Workspace and the LSEG Data Platform. These 'LSEG Data Platform Libraries' can be used to build applications running beside LSEG Workspace or within LSEG Workspace in CodeBook.

Why is the support model for CodeBook and Workspace APIs different?

CodeBook is an open development environment that you can use to implement a variety of custom workflows. As a CodeBook user you may need help and support regarding a variety of different topics such as LSEG APIs, LSEG content, or even the CodeBook app itself.

Our dedicated CodeBook and Workspace APIs support model guarantees that you are quickly put in touch with subject matter experts who can help to resolve your issues.

Support Model for CodeBook and Workspace APIs

There are two support channels for customers using CodeBook and LSEG Workspace APIs:

- The Developer Portal, <https://community.developers.refinitiv.com>
- LSEG Customer Support Desk

The following table outlines the features of both channels:

LSEG Developer Portal	LSEG Customer Support Desk
<p>Suitable for answering 'How To' types of programming / coding questions.</p> <p>Provides online resources like quick start guides, tutorials, documents, examples, and articles for LSEG APIs.</p> <p>Gives you access to Q&A forums where a team of developer advocates and the larger LSEG developer community can provide answers to your questions about programming with LSEG APIs.</p>	<p>Suitable for technical issues as well as functionality and content questions regarding CodeBook and LSEG Workspace APIs.</p> <p>Support desk teams evaluate issues using Live Chat, email, over the phone, or through the Workspace section of the authenticated website.</p> <p>Once a first assessment is done, the support desk escalates the issue to the most appropriate resolver group within LSEG as needed.</p>

Whichever support channel you choose, LSEG teams will ensure you are directed to the most suitable channel so that your question or issue is handled quickly and efficiently.

Evolution

Updates

Customers who have deployed the LSEG Workspace software have the choice whether to enable automatic updates to LSEG Workspace. Note that customers who are accessing LSEG Workspace in a web browser will always be running on the most recent version.

If a customer is...	Then...
Enabled for automatic updates	<p>General updates for Workspace will happen automatically. These do not require any installation or other action from users or from market data/customer administrators.</p> <p>LSEG Workspace has an update mechanism to allow customers using LSEG Workspace to update their current version to the latest version. This is in the form of an integrated software update feature that does not require any user action.</p>
Not enabled for automatic updates	<p>The customer should update manually and ensure they are running a supported version of the LSEG Workspace Software which is one of the three most recent versions.</p> <p>Customers can download the latest version of the LSEG Workspace software on the Workspace section of the authenticated website where they can also register for Product Change Notifications and be alerted when new version of the LSEG Workspace software was released.</p> <p>The latest version of LSEG Workspace can be found on:</p> <ul style="list-style-type: none"> – The LSEG Workspace page on the Workspace section of the authenticated website, or – The LSEG Workspace download page.

Upgrades

LSEG Workspace is updated on a periodic basis. These releases incorporate fixes for reported issues and enhancements to the product's capabilities. Each release is assigned a version number, which is used to indicate the relative impact of the release. While you can choose whether to upgrade to the latest supported release of Workspace desktop access, you are always presented with the very latest version of both web and mobile access.

For further information, see [Workspace Release Notes](#), which, contains information about the current and supported versions of LSEG Workspace.

LSEG Workspace desktop access

Major releases are indicated by the first delimited figure and contain significant changes and new features. They are assigned a major version number, such as 1.x, 2.x, 3.x, and so on.

Minor releases are indicated by the second delimited figure, and contain platform enhancements, fixes, and technical changes. They are assigned a minor version number, such as x.1, x.2, x.3, and so on.

LSEG currently operates on a cycle of:

- A *maximum* of one (1) major release per year, and
 - A *maximum* of four (4) minor releases per year
- ① LSEG does not commit to any minimum number of annual releases, so a typical year may see fewer releases than this.

Customers using LSEG Workspace acknowledge that this release schedule is subject to change at the discretion of LSEG. LSEG will notify customers of technical changes using Product Change Notifications (PCN) and in cases where required their Account Team. We recommend using the latest version of LSEG Workspace using automatic updates. Contact your Account Team to discuss upgrade needs.

Customer administrators can see which versions their users are using through the [Workspace section](#) of the authenticated website. Users can see the same by hovering over the LSEG Workspace icon in the System Tray.

The LSEG Customer Implementation and Professional Services Team will not install any versions of LSEG Workspace older than the previous two.

LSEG Workspace web access

You will always be presented with the most current version of LSEG Workspace web access each time you sign in.

LSEG Workspace mobile access

You will always be able to download the latest version of each mobile product from the official iOS App Store at your discretion, or through automated app updates turned on from your mobile device.

New versions of each app will be released on an ad hoc basis, so there will not be a set release schedule. We recommend you check the app stores regularly or enable auto updates on your device to ensure you have the latest, fully featured version installed.

For help on LSEG Workspace mobile, go to your Profile and:

- Select **Submit an Issue** to raise a ticket in the [Workspace section](#) of the authenticated website, or
- Select **Call Helpdesk**, which will display a list of global contact numbers

Workspace Messenger

Workspace Messenger is a free, secure, and compliant instant messaging solution that gives you access to the world's largest verified directory of financial market participants across an open messaging network. Because compliance underpins the global messaging community, Workspace Messenger is the trusted provider for external communications.

Workspace Messenger is integrated within our distinct Eikon and Workspace services and is also offered as a Standalone service for financial market participants. LSEG messaging offers compliance services to abide with regulatory obligations concerning the keeping of electronic communication records.

LSEG Workspace has an update mechanism allowing users of Workspace Messenger to update their current version to the latest one. This is an integrated software update feature that does not require any user action. To install updates manually, Market Data IT Administrators can use the link provided by their Account Team or the [Workspace section](#) of the authenticated website.

Although Workspace Messenger is free, it may not come by default with your variant of LSEG Workspace. This allows corporations the flexibility to manage their business messaging compliance and requirements. We recommend using the latest version of LSEG

Workspace using automatic updates to access the latest version of Workspace Messenger.
Contact your Account Team to discuss your upgrade needs.

Appendix 1: LSEG Workspace Access to After Market Research

The following table contains variations to the service description in the rest of this document that apply to Access to After Market Research only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace Access to After Market Research is targeted at Investment Banking users who require access to After Market Research only and would like a solution at a reasonable price. It is important for specific Customer groups with requirements for distinct specific content sets or functionality, which are not serviced by our existing product and solutions offering. This variant extends the ability of customers to support workflow, and to communicate and share information consistently across all user types within a company.</p> <p>SCOPE AND SCALE</p> <p>LSEG Workspace Access to After Market Research is available for existing Investment Banking customers and Thomson One Banking users requiring access to After Market Research.</p> <p>This variant contains limited content and capabilities and does not include the following premium features:</p> <ul style="list-style-type: none"> – Fundamentals – Estimates – Deals – Codebook and APIs <p>For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>The offering in LSEG Workspace - Access to After Market Research will consist of After Market Research (AMR) through the Advanced Research Search application.</p>
Purchase and Review	Aftermarket Research Free Trial – Permitted to download a maximum of 10 Aftermarket Research documents.
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 2: LSEG Workspace for Investment Bankers

The following table contains variations to the service description in the rest of this document that apply to Investment Bankers only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Investment Bankers provides a customised solution for customer segments within investment banking and capital markets, typically covering M&A and coverage bankers, private equity and venture capital, corporate strategy, financial planning and treasury/analysis, and BIS functions.</p> <p>SCOPE AND SCALE</p> <p>LSEG Workspace is available for existing Investment Banking customers of LSEG. For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for Investment Bankers is cross-asset class and provides content and functionality central to investment banking and advisory workflows, including:</p> <ul style="list-style-type: none"> – Messenger (Optional) – Aftermarket Research (add on) – Capital Markets (add on) – Reuters News – Company Events – Company Views (including deals, estimates, fundamentals, and ownership) – Charts – Mobile apps – Full screening capabilities – Premium Deals with full history – Microsoft Office add-in – StarMine content – Datastream content – Conflated data <p>LSEG Workspace for Investment Bankers does not include real time data or trading workflows.</p>
Purchase and Review	<p>Aftermarket Research Free Trial – Permitted to download a maximum of 10 Aftermarket Research documents.</p> <p>Capital Markets add on – This add on provides capital markets origination bankers (equity capital markets, debt capital markets, leverage and acquisition finance, project finance and loans) and syndicate desks with the appropriate tools, apps, and datasets. It features real time data sets; fixed income, equities, and commodities pricing calculators, indices and monitor / analytical apps, and is backed by the existing datasets and features of Workspace for Investment Banking. The add on will empower professionals to perform many of their necessary tasks, from origination to structuring, execution or pricing.</p>
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 3: LSEG Workspace for Investment Bankers – Consultant Edition

The following table contains variations to the service description in the rest of this document that apply to Investment Bankers – Consultant Edition only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Investment Bankers – Consultant Edition provides a customized solution for consulting firms.</p> <p>SCOPE AND SCALE</p> <p>LSEG Workspace for Investment Bankers – Consultant Edition is available for existing consulting firms of LSEG.</p> <p>For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>Workspace for Investment Bankers – Consultant Edition is cross-asset class and provides content and functionality central to consulting firm workflows, including:</p> <ul style="list-style-type: none"> – Messenger (Optional) – Aftermarket Research (Add on) – Datastream (Add on) – Capital Markets (Add on) – Reuters News – Company Events – Company Views (including ESG, estimates, fundamentals, and ownership) – Charts – Full screening capabilities – Premium Deals with full history – Microsoft Office add-in – StarMine content – Conflated data <p>Workspace for Investment Bankers – Consultant Edition does not include real time data or trading workflows.</p>
Purchase and Review	<p>Capital Markets add on – This add on provides capital markets origination bankers (equity capital markets, debt capital markets, leverage and acquisition finance, project finance and loans) and syndicate desks with the appropriate tools, apps, and datasets. It features real time data sets; fixed income, equities, and commodities pricing calculators, indices, and monitor / analytical apps, and is backed by the existing datasets and features of Workspace for Investment Banking. The add on will empower professionals to perform many of their necessary tasks, from origination to structuring, execution or pricing.</p>
Setup	No variation
Product Usage	No variation
Support	For assistance with Self Registration API, resources are available in the Developer Community .
Evolution	No variation

Appendix 4: LSEG Workspace for Students

The following table contains variations to the service description in the rest of this document that apply to students only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Students provides a customized solution for under and post graduate students in business schools and universities. Professors, PHD students and staff in academic institutions will use LSEG Workspace.</p> <p>LSEG Workspace for Students will provide users with named individual licenses, which includes capabilities, such as preferences / workspace customization, saving searches, personal portfolio / watchlists, and access to LSEG Workspace Web from any PC.</p> <p>Each user will have his/her own named ID and IDs will no longer be generic or shared.</p> <p>For more information speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for Students is available for new and existing academic customers of LSEG.</p> <p>WORKSPACE FOR STUDENTS EXCLUSIONS</p> <ul style="list-style-type: none"> – Messenger – Healthcare Intelligence App (HCARE) – Directory App (PROFILE) – Public Information Book App (PIB) – Get Support (HELP) app – App Studio apps – Will not be exposed, unless requested – Court Wire App (COURT) – Datastream is an add-on
Purchase and Review	<p>PURCHASING PARTNER APPS</p> <p>Partner apps are not exposed in Workspace for Students but can be exposed and ordered if requested. Speak to your Account Team for more information.</p> <p>USER MAINTENANCE</p> <p>License Management Tool</p> <p>LSEG has self service capabilities of managing trial accounts, ordering more licenses, allocating licenses, and so on across Workspace Customers.</p> <p>The following capabilities are available to manage a large number of licenses.</p> <ul style="list-style-type: none"> – csv file upload capability <p>The capability enables an administrator to upload multiple users' details at once by uploading a csv file. It has an option to grant a license to each uploaded user at the same time or grant a license to all or selected users later. Removing a license from multiple users at once is also possible.</p> <p>The tool will include a capability to assign a group identifier to each user and to remove licenses by selecting a group. This provides the administrator with the ability to easily remove licenses from users within a particular team or a project.</p> – Self-registration capability <p>Each end user can request a license online with little or no intervention from the administrator.</p>
Setup	No variation

Chapter	Variations													
Product Usage	<p>To better service academic staff, new add-ons are required to ensure they have access to Workspace for Students while replicating the degree of service they had access to under T1 and Eikon for professors which also provided higher usage levels at a differentiated price point.</p> <p>The following table summarises the product usage limits:</p> <table><tr><th></th><th></th><th>Students</th><th>Professor/Researcher</th></tr><tr><td>DataStream</td><td>Ceiling</td><td>10m data points per month</td><td>Unlimited</td></tr><tr><td rowspan="2">AMR</td><td rowspan="2">Ceiling</td><td>\$2k retail value</td><td rowspan="2">\$60k retail value, with no limit on pages per day</td></tr><tr><td>150 pages per day</td></tr></table>			Students	Professor/Researcher	DataStream	Ceiling	10m data points per month	Unlimited	AMR	Ceiling	\$2k retail value	\$60k retail value, with no limit on pages per day	150 pages per day
		Students	Professor/Researcher											
DataStream	Ceiling	10m data points per month	Unlimited											
AMR	Ceiling	\$2k retail value	\$60k retail value, with no limit on pages per day											
		150 pages per day												
Support	<p>Guidelines for handling cases raised by students and university employees:</p> <ul style="list-style-type: none">– Only users with an Academic Staff add on are entitled to Customer Support including use of the Developer Portal.– The exceptions are university students who are using Thomson Reuters Eikon Premium, who should receive BAU support. <p>Learning is available from Refinitiv Academy: https://solutions.refinitiv.com/academy</p>													
Evolution	No variation													

Appendix 5: LSEG Workspace for Wealth Advisors

The following table contains variations to the service description in the rest of this document that apply to wealth advisors only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Wealth Advisors provides a tailored product for the wealth management community.</p> <p>It is a portfolio-centric tool that allows both advisory teams and relationship managers to work effectively with the product, while ensuring a high level of governance throughout.</p> <p>Included in LSEG Workspace for Wealth Advisors, the Advisor Dashboard provides financial advisors with tools and insights to understand and visualize the impacts of market activity on their practice and Customers.</p> <p>Instead of needing to sift through market data views to analyse and understand how market activity is impacting their Customers, advisors use the Advisor Dashboard to efficiently gain insights, leaving more time for meaningful customer engagements.</p> <p>For more information speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for Wealth Advisors is cross-asset class and provides content and functionality central to the analyst and wealth management workflows, including:</p> <ul style="list-style-type: none"> – Reuters News – Sell-Side and Independent Company, Industry, and Market Research – Company Events (including Transcripts and Briefs) – Company Views (including Estimates, Fundamentals, and Ownership) – Portfolio Management Tools – Charts – Mobile apps – Screening – StarMine Analytics (Model Scores) – Pricing Data – Microsoft Office Add-in (limited) – Fixed Income Calculators – Blended Order Book – Advisor Dashboard – ESG (non-premium) – Lipper Funds – Explore Products – Securitized Derivatives

Chapter	Variations
Purchase and Review	<p>PURCHASING ADDITIONAL APPLICATIONS</p> <p>Purchasing LSEG Apps</p> <p>Generic LSEG applications are not available for purchase individually but are packaged into propositions based on the workflows of users. LSEG Workspace contains all the available LSEG applications. However, certain add-ons fees may be applied to the individual applications if they require a significant amount of onboarding.</p> <p>This primarily refers to the workflow applications in LSEG Workspace for Wealth Advisors, such as House Views and Market Insights (HVMI). For HVMI's service description, see the relevant document on the Workspace section of the authenticated website. You can also obtain administrator functionalities for Portfolio Analytics, ESG and Stock Reports Plus in standard LSEG Workspace for Wealth Advisors. Both the Portfolio Administrator and HVMI are free of charge add-ons although HVMI has an onboarding cost. Stock Reports Plus and ESG are both fee liable add-ons. Within the Advanced version the only add-on needed would be for HVMI and any portfolio integration costs.</p> <p>Detailed Estimates may be added on in Australia and New Zealand.</p> <p>Your Account Team is available to discuss the best proposition to suit your individual needs.</p> <p>Purchasing Partner Apps – No variation</p> <p>Free Trials – No variation</p> <p>Accessing Applications – No variation</p> <p>PURCHASING ADDITIONAL CONTENT</p> <p>You can purchase additional LSEG and partner content by requesting it from your Account Team. You can find a catalogue of content available for purchase in the Content Kiosk application in LSEG Workspace. The Content Kiosk app is available in the App Library or by searching "Content Kiosk". Within LSEG Workspace for Wealth Advisors you can also purchase advanced ESG content and Stock Reports Plus data as add-ons for minimal monthly fees.</p> <p>BILLING – No variation</p> <p>PARTNER APPLICATIONS AND CONTENT – No variation</p> <p>USER MAINTENANCE – No variation</p> <p>RENEWALS AND CANCELLATIONS – No variation</p>
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 6: LSEG Workspace IWM

The following table contains variations to the service description in the rest of this document that apply to LSEG Workspace for Investment Wealth Management (IWM) only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace IWM is a tailored solution addressing the needs of asset managers, hedge funds, banks, endowments, sovereign funds, and private equity firms.</p> <p>It is a workflow-centric tool focused on market monitoring, idea generation, valuation analysis, and portfolio management. LSEG Workspace IWM is designed to adjust to users' habits and includes customizable functionality, resulting in the product quickly providing relevant content in an intuitive design.</p> <p>Included in LSEG Workspace IWM, the Advisor Dashboard provides financial advisors with tools and insights to understand and visualize the impacts of market activity on their practice and customers.</p> <p>Instead of needing to sift through market data views to analyse and understand how market activity is impacting their customers, advisors use the Advisor Dashboard to efficiently gain insights, leaving more time for meaningful customer engagements.</p> <p>For more information, speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace IWM is cross-asset class and provides content and functionality central to the analyst and portfolio management workflows, including:</p> <ul style="list-style-type: none"> – Reuters News – Sell-Side and Independent Company, Industry, and Market Research – Company Events (including Transcripts and Briefs) – Company Views (including Estimates, Fundamentals, and Ownership) – Portfolio Management Tools – Charts – Mobile apps – Screening – StarMine Analytics – Datastream – Pricing Data – Microsoft Office Add-in – Fixed Income Calculators – Blended Order Book – Correlation Matrix – Supports and Resistances – Agriculture Spreads – MiFID OTC Derivatives Repository – SDR Viewer – Spot Competition – Stock Reports Plus – ETF Reports Plus – Advisor Dashboard – Lipper Funds – Explore Products – Securitized Derivatives

Chapter	Variations
Purchase and Review	<p>Generic LSEG applications are not available for purchase individually but are packaged into propositions based on the workflows of users. LSEG Workspace contains all the available LSEG applications. However, certain add-ons fees may be applied to the individual applications if they require a significant amount of onboarding.</p> <p>This primarily refers to the workflow applications in LSEG Workspace for Wealth Advisors, such as House Views and Market Insights (HVMI). For HVMI's service description, see the relevant document on the Workspace section of the authenticated website.</p>
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 7: LSEG Workspace for FX Trading

The following table contains variations to the service description in the rest of this document that apply to Foreign Exchange and Money Markets Trading workflows only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for FX Trading is a tailored solution addressing the needs of FX and Money Market Traders across the FX ecosystem including primary dealers, agency banks, brokers, and active buy-side traders.</p> <p>It is a workflow-centric tool focused on market monitoring, idea generation, trading risk management and valuation of spot FX, forwards, NDFs, FX options and short-term interest rate products.</p> <p>LSEG Workspace for FX Trading is designed to adjust to users' habits and includes customizable functionality, resulting in the product quickly providing relevant content in an intuitive design.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for FX Trading is global, cross-asset class, and provides content and functionality central to FX and Money Market Trading workflows, including:</p> <ul style="list-style-type: none"> – Exclusive market price discovery content from LSEG venues, including Matching and FXall spot and forward rates. Availability of broker rates for all FX and rate derivatives. In terms of FX content for emerging markets, LSEG Workspace for FX Trading is best in class. – Reuters News, as well as over 10,500 additional sources and exclusive technical market commentary from FX Buzz. – Full suite of FX and Money Market calculators, including FX forwards, NDFs, deposit analysis, FX options with support for customer contributed curves, and surfaces to drive analytics. – Unique insights and views derived from LSEG's exclusive content. This includes Reuters Polls, Matching Liquidity Heatmap, FX Performance Tracker, SDRV Regulatory Reported trades, as well as cross-asset/global-macro insight to support FX trading activities. Curve Builder will provide FX and IR term structures for scenario analysis and ingestion via the calculators. – MARVAL, which provides position revaluation and risk metrics across Spot FX, Forwards, FX Swaps, NDFs, FX Options and Term Deposits. It will also support rates and derivatives including fixed income cash and derivatives. – Datastream and Charting / technical analysis covering 50 million+ time series, 70+ years of data across 175+ countries. Also includes Time and Sales with trades for matching FX data. – Mobile apps – Microsoft Office Add-in – Codebook <p>For more information, see the FXT Service Description at this location: https://www.refinitiv.com/en/products/fx-trading/</p>
Purchase and Review	No variation
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 8: LSEG Workspace for Students / Reference Data Package

The following table contains variations to the service description in the rest of this document that apply to students only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Students Reference Data Package. The target users are under and post graduate students in business schools and universities. The target users are not professors, PhD students who need customer support, and staff in academic institutions. Instead, these people should use LSEG Workspace for Students with the relevant add-ons for academic staff.</p> <p>The LSEG Workspace for Students Reference Data Package variant contains content and applications specifically designed for the business reference needs of students.</p> <p>For more information speak to your Account Team.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for Students is available for new and existing academic customers of LSEG.</p> <p>WORKSPACE FOR STUDENTS EXCLUSIONS</p> <ul style="list-style-type: none"> – Messenger – Healthcare Intelligence App (HCARE) – Directory App (PROFILE) – Public Information Book App (PIB) – Get Support (HELP) app – App Studio apps – Will not be exposed, unless requested – Court Wire App (COURT) – Datastream is an add-on – Aftermarket Research Collection (AMR) – Include exclusions mentioned on CET

Chapter	Variations
Purchase and Review	<p>PURCHASING PARTNER APPS</p> <p>Partner apps are not exposed in Workspace for Students but can be exposed and ordered if requested. Speak to your Account Team for more information.</p> <p>USER MAINTENANCE</p> <p>License Management Tool</p> <p>LSEG has self service capabilities of managing trial accounts, ordering more licenses, allocating licenses, and so on across Workspace customers.</p> <p>The following capabilities are available to manage a large number of licenses.</p> <ul style="list-style-type: none"> – csv file upload capability <p>The capability enables an administrator to upload multiple users' details at once by uploading a csv file. It has an option to grant a license to each uploaded user at the same time or grant a license to all or selected users later. Removing a license from multiple users at once is also possible.</p> <p>The tool will include a capability to assign a group identifier to each user and to remove licenses by selecting a group. This provides the administrator with the ability to easily remove licenses from users within a particular team or a project.</p> – Self-registration capability <p>Each end user can request a license online with little or no intervention from the administrator.</p>
Setup	No variation
Product Usage	No variation
Support	<p>Guidelines for handling cases raised by students and university employees of LSEG Workspace for Students Reference Data Package:</p> <ul style="list-style-type: none"> – Users need to contact the plan administrator or business librarian. – Learning is available from LSEG Academy: https://solutions.refinitiv.com/academy
Evolution	No variation

Appendix 9: LSEG Workspace for Academia – Campus

The following table contains variations to the service description in the rest of this document that apply to users of LSEG Workspace for Academia – Campus only:

Chapter	Variations
About LSEG Workspace for Academia - Campus	<p>LSEG Workspace for Academia – Campus is a product targeting the academic market and the upgrade of Mergent Online customers.</p> <p>The target users are undergraduate and postgraduate students in business schools and universities, most commonly accessing the application via university / college libraries.</p> <p>The commercial model for LSEG Workspace for Academia – Campus is designed to attract the “low-cost” academia market, starting at \$6.67 per user for a minimum of 100 users. Additional users will scale according to user band.</p> <p>LSEG Workspace for Academia – Campus is most closely aligned to LSEG Workspace for Wealth and is considered a basic Workspace solution.</p> <p>LSEG Workspace for Academia – Campus does not offer any add-on services such as SDC Platinum, AMR, and Datastream.</p> <p>LSEG Workspace for Academia – Campus, like LSEG Workspace for Students, does not offer a customer support model to its end users. Only admin support is available.</p> <p>LSEG Workspace for Students and LSEG Workspace for Academia – Campus can both be purchased and utilized at the same university / college.</p>
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for Academia - Campus is available for new and existing academic customers of LSEG.</p> <p>LSEG Workspace for Academia – Campus exclusions:</p> <ul style="list-style-type: none"> – Messenger – Healthcare Intelligence App (HCARE) – Directory App (PROFILE) – Public Information Book App (PIB) – Get Support (HELP) app – App Studio apps will not be exposed, unless requested – Court Wire App (COURT) – DataStream – Aftermarket Research Collection (AMR) – Include exclusions mentioned on CET – SDC PLATINUM (add-on required)

Chapter	Variations
Purchase and Review	<p>PURCHASING ADDITIONAL APPLICATIONS</p> <p>Partner apps are not exposed in Workspace for Academia – Campus.</p> <p>USER MAINTENANCE</p> <p>License Management Tool –</p> <p>LSEG has self service capabilities of managing trial accounts, ordering more licenses, allocating licenses, and so on across Workspace customers.</p> <p>The following capabilities are available to manage many licenses.</p> <ul style="list-style-type: none"> – Auto-expiration of licenses based on a specific timeframe This enables customers to determine the number of days a user has access to Workspace. – csv file upload capability. This enables an administrator to upload multiple users' details at once by uploading a csv file. It has an option to grant a license to each, uploaded user at the same time or grant a license to all or selected users later. ① Removing a license from multiple users at once is also possible. The tool will include a capability to assign a group identifier to each user and to remove licenses by selecting a group. This provides the administrator with the ability to easily remove licenses from users within a particular team or a project. – Self-registration capability. Each end user can request a license online with little or no intervention from the administrator. <p>Purchasing WS Apps – N/A</p> <p>Purchasing Partner Apps – N/A</p> <p>Free Trials – N/A</p> <p>Accessing Applications – No variation</p> <p>Purchasing Additional Content – N/A</p> <p>Billing – Up to six months of delayed billing for migration of Mergent Online. No variation for new customers.</p> <p>Partner Applications and Content – N/A</p> <p>User Maintenance – No variation</p> <p>Renewals and Cancellations – No variation</p>
Setup	No variation
Product Usage	No variation
Support	<p>Guidelines for handling cases raised by students and university employees of the LSEG Workspace for Academia – Campus package:</p> <ul style="list-style-type: none"> – Users need to contact the plan administrator or business librarian. – Learning is available from LSEG Academy: <ul style="list-style-type: none"> – https://solutions.refinitiv.com/academy
Evolution	No variation

Appendix 10: LSEG Workspace for Sales & Traders

The following table contains variations to the service description in the rest of this document that apply to users of LSEG Workspace for Sales & Traders only.

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Sales & Traders addresses the needs of a wide range of users. The job roles specifically targeted are Traders, Sales, and Brokers, but the product is also appropriate for some middle and back-office job roles. LSEG Workspace for Sales & Traders is:</p> <ul style="list-style-type: none"> – A cross asset product, providing a solution for the Fixed Income, Equity, FX, Commodities, Corporate Treasury and Central Bank communities – A workflow-centric tool developed to provide a complete solution from pre-trade trade, to trade, to post-trade – Intuitively designed to adjust to users' habits, including customizable functionality that provides relevant content in quick time
Discover	No variation
Evaluate	<p>SUPPORTED CONTENT</p> <p>LSEG Workspace for Sales & Traders is cross-asset and provides content and functionality to both the sell side and buy side. It consists of a base product as well as an optional premium add-on package that is subject to fees. Key features of the product may include:</p> <ul style="list-style-type: none"> – Reuters News – Price discovery monitoring tools across all trading asset classes – At trade apps – Post trade valuation via MARVAL app – Calculators and analytics for all asset classes – Tools to allow users to price OTC instruments using their own specified curves and inputs – Charts – Mobile apps – Datastream – Exchange and OTC pricing from both LSEG and contributors – Microsoft Office Add-in
Purchase and Review	No variation
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 11: LSEG Workspace for Media

The following table contains variations to the service description in the rest of this document that apply to LSEG Workspace for Media only:

Chapter	Variations
About LSEG Workspace	LSEG Workspace for Media is a tailored solution addressing the needs of journalists and public relations professionals. For more information speak to your Account Team.
Discover	No variation
Evaluate	SUPPORTED CONTENT LSEG Workspace for Media is cross-asset class and provides content and functionality for journalists and PR professionals including: <ul style="list-style-type: none"> – Third party news – Sell-side and independent company, industry, and market research – Company Events (Including transcripts and briefs) – Company Views (including estimates, fundamentals, and ownership) – Portfolio management tools – Charts – Mobile apps – Screening – StarMine Analytics – Datastream – Pricing data – Microsoft Office Add-in – Fixed Income calculators
Purchase and Review	No variation
Setup	No variation
Product Usage	No variation
Support	No variation
Evolution	No variation

Appendix 12: LSEG Workspace for Kiosks

The following table contains variations to the service description in the rest of this document that apply to LSEG Workspace for Kiosks only:

Chapter	Variations
About LSEG Workspace	<p>LSEG Workspace for Kiosks imitates Unified Workspace, but excludes access to the following:</p> <ul style="list-style-type: none"> – Third party fee liable RT exchanges – Collaboration tools like Messenger – RT Research, Aftermarket research – Desktop API / Data Grid – Datastream – Workspace Mobile
Discover	No variation
Evaluate	No variation
Purchase and Review	<p>PURCHASING ADDITIONAL APPLICATIONS</p> <p>Purchasing Refinitiv Apps - No variation</p> <p>Purchasing Partner Apps – No variation</p> <p>Free Trials – Not permitted</p> <p>Accessing Applications – No variation</p> <p>Purchasing Additional Content – No variation</p> <p>Billing – No variation</p> <p>Partner Applications and Content – No variation</p> <p>User Maintenance – No variation</p> <p>Renewals and Cancellations – No variation</p>
Setup	<p>Kiosk IDs must be generic and must always begin with the word 'kiosk'.</p> <p>The following format is recommended: "Kiosk#.department.location@Customerdomainname.com"</p> <p>The generic kiosk ID is mapped to a named individual's email at the site where the kiosk is installed (for example, Risk.NY@Midbank.com is mapped to janet.logan@midbank.com).</p> <p>This person would normally be the department sponsor for the kiosk.</p>
Product Usage	<p>This product is meant to be shared by 3+ users.</p> <p>Eligibility, customer segmentation and other usage rights will be managed through the Product Notes (contractual clauses) included in the Order Form of LSEG Workspace for Kiosks.</p>
Support	No variation
Evolution	No variation