

## Getting Caught Off Guard Can Negatively Impact Your Share Price

### Your Challenge

In recent years, the time for Investor Relations (IR) to respond to news and market developments has shortened dramatically. Scrutiny around quarterly earnings is as intense as ever, and getting caught off guard by an analyst's question on the earnings call can cause your stock price to tumble.

Making the case for the long-term outlook of the company places more pressure on you than ever before. Improving the quality of preparation for earnings calls and one-on-one meetings with analysts and institutional investors is paramount. Briefing the C-Suite on developments at competitors as disclosed in filings and earnings calls is imperative.

Shareholder activism continues to rise. Investment professions are increasingly interested in nonfinancial information, like ESG and corporate governance.

And the burden to manage all of this falls to you.

### Our Solution



By tagging and linking together company earnings call transcripts with SEC filings and exhibits, Intelligize delivers a must have solution for Investor Relations professionals — as you look to prepare senior executives for earnings calls and craft language for shareholder communications.



Intelligize is the only solution that enables you to separate out the Q&A portion of earnings calls and identify questions previously asked by an individual (or firm). With full-text search across both filings and earnings call transcripts, you can quickly identify trends, keep tabs on competitors and uncover language used by peers in your industry.



The Intelligize Earnings Call Transcripts provides more than 50,000 documents coupled with the ability to apply exact search filters to identify attending analysts and key topics. You can focus your review on call transcripts involving companies, industries, and specific analysts to better identify key discussion points that will likely be raised.



You will spend less time researching SEC filings and more time applying insight to strategic responses by checking frequency and context of specific topics in key sections such as MD&A, Risk Factors and CD&A. Intelligize creates an intuitive bridge between earnings call transcripts and material regulatory content to help:

- Take the pulse of Wall Street and determine what issues investors will want to hear during a call.
- Tune in to what your competitors are reporting and discussing.
- Gain awareness through peer comparisons across companies, industries, and individual filing sections.
- Seamlessly leverage transactional deal summaries for situational awareness and best practices in companies going through acquisitive periods.

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### Why Us



#### Market Monitoring

- Keep your finger on the pulse of what's market for topics in disclosures and concerns from investors across thousands of filings, SEC comment letters, earnings calls and firm memos
- Improve the quality of executive team preparation for earnings calls and reduce the risk of being caught off-guard by an analyst question
- Systematically track and analyze the latest disclosures and earnings calls from competitors, and generate insights for the C-suite



#### Manage Your Company's Message

- When major external events occur, quickly identify trending disclosures and language from peers in your industry and examine relevant Q&A with investors – to inform your own company's response
- Analyze transcripts from the earnings calls made by other companies to help develop the right balance in the articulation of your company's future plans



#### Investor Management and Targeting

- Quickly arm yourself with the necessary insights to position your company following a competitor's earnings upgrade or downgrade and influence the market narrative
- Improve the quality of preparation for earnings calls or one-on-one meetings with institutional investors with a heads up on their typical concerns and the questions they are likely to ask, reducing the risk of unexpected questions
- Be better prepared to respond to activist shareholders, using insights from proxy documents filed with the SEC and corporate governance documents from other companies

By incorporating earnings call transcripts into Intelligize, you have access to an end-to-end solution that provides a bird's eye view of material business and regulatory information to draw insight and best practices as you prepare for high visibility meetings with the executive team. Intelligize covers the full gamut of essential business information:

- Proxy material
- Press releases
- Extraordinary events
- Comment letters
- Transactional

#### Don't put your executive team at risk.

Expand your reach beyond SEC filings with Intelligize Earnings Call Transcripts.

### Contact Us To Learn More

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