



### All-in Analytics Platform for Fundamental Portfolio Managers

SISMO														
	I< < 29 Jun 2022 > > > >		Stock	ks within	universe 60 Stan	niverse-Z	<b>→</b>							
• • •	Speed 2.0s 2.6		A Order of Active Sorting Order   Similarity Similarity											
US Test U-Z [Weighted Avg]				tfolio										
• Visa Inc. U-Z			US	TEST X			l	owth	mentur	Ouality		ontiment	, WB	
Average ± σ	Value				Name 🔺							୫°୍ଟ ଅ <sub>୍</sub> ▲ ଐ	Ko. ▼	() () () ()
·			*	① 0.36	CSX CORPORATION	💷 Ģ	<u>B</u> B	-0.71				+0.04		
			$\star$	(i) 0.30	OTIS WORLDWIDE C	🔳 🤹	<u> </u>	-0.80	+0.07	+0.21	-0.71	+0.25	-0.76	-0.13
Sentiment	Yield				THERMO FISHER SCI			-0.51	+0.22	+0.01	-0.55	+0.61	-0.53	-0.82
					ZOETIS INC.			-0.41	+0.37	+0.82	-0.48	+0.84		-0.59
					VISA INC.			-0.15	+0.34	+0.77	-0.23	+0.47		-0.53
					THE ESTEE LAUDER	مر 💻 . ا> ا		-0.17	+0.39	+0.91 +1.08	+0.06 +0.04	+0.07	-0.84	-0.45
					UNION PACIFIC COR	_		-0.73	+0.06		+0.04			+0.29
					CATERPILLAR INC.			-0.48	-0.25	+0.19	-0.02			+0.51
			*	① 0.40	DEERE & COMPANY	🔳 🤹	<u>.</u>	-0.38	-0.61	-0.16	+0.01	-0.37	+0.03	-0.21
- / /			$\star$	(i) 0.35	MARTIN MARIETTA M	. 🔳 📬	i <u>e</u> e	-0.16	-0.84	-0.37	-0.16	+0.23	-0.23	-0.46
		Post	$\star$	(i) 0.28	THE CHARLES SCH	-	<u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u>	+0.31	-0.64	-0.26	+0.12	+0.57	+0.06	-0.25
Risk 😽	-2 -1 1 2	Best			TE CONNECTIVITY L			+1.04	-0.51	+0.32	+0.26	+0.07	-0.04	+0.12
		Fit			AMERICAN EXPRES			+0.06	-0.71		+0.71		+0.03	-0.19
					AI PHABET INC. INPI			+0.22	-0.58	+0.65	-0.60	+0.48	-0.40	-0.67
								TU.ZI	TU.00		-0.00	- U.IU		



Sismo brings to fundamental investors the best of what quantitative analysis can offer, in an intuitive and easy-to-use interface, with dailyupdated data from S&P Capital IQ on global equities.

## Advanced and unique comparative analysis with striking visualization designed for stock pickers and investment managers.

- Access directly in-depth portfolio analysis on dynamic equity universes
- Leverage on visuals designed to read at a glance trends & correlations and spot outliers
- Identify instantly portfolio factors' exposures and macroeconomic biases of allocations
- Check factors peers, partial factor peers and any stock worthy of your attention
- Optimize portfolios per your own criteria
- Use rank analysis to create in seconds advanced screenings that match any profile
- Access valuable insights and generate investment ideas supported by in-depth analysis

# SSS



#### **Global equity coverage with daily** updated financial & market data

#### **Common & advanced financial metrics**

(Risk, Performance, Returns, **ROCE, EVA, Brokers' forecasts**, **Cost of equity, Valuation)** 

### **Investment style factors**

**Off-the-shelf Sismo-defined or** user-built factors

**Intuitive UI allowing to express** complex queries in a few clicks

#### **Advanced analysis** functionalities

**Analytics** 

**Dynamic universe builder Portfolio upload & analysis Multi-metrics filtering & scoring Stock & portfolio factor profile Factor peers & partial peers Portfolio optimization Rank analysis Advanced screening capabilities** Investment strategy back-testing





**Innovative displays of comparative** positions on multiple criteria

#### **Point-and-click access** to in-depth information

**Check-and-refine approach** with iterative narrowing-down search process

#### **User libraries**

**Custom factors Screenings Ranking analyses** 



- Sismo is a SaaS platform, designed with the objective to bring at a glance to the investors' eyes the dynamics of stocks on standard and proprietary financial indicators, with zero compromise on data accuracy.
- Accessing appropriate comparative information is the first step in investment decision. From there on, we developed a seamless point-and-click user experience to dig into historical and prospective data, save and compare analyses with multiple iterations, define and back-test multi-factor strategies.
- Sismo offers insightful factor analysis and "quantamental" approach to fundamental equity investors. Our clients use Sismo to check their factor biases and adjust their holdings, with marginal optimization features based on their criteria. The Rank analysis provides a unique tool for advanced market screenings.

With Sismo, we bring to the investment community an intuitive, versatile and scalable analytical solution, for improved investment strategies, in a highly competitive and cost-constraint environment.











































