

Enterprise Level CRM

Generate More Opportunities

BD Vision is designed to increase the productivity of institutional sellside professionals during critical morning and intraday call periods, in the office and on the road. Our platform serves all participants in the capital markets and addresses their operational and business management needs, while simultaneously delivering critical information, communications and analytical tools to research analysts, salespeople and traders, improving their productivity and effectiveness. BD Vision can be easily integrated with other platforms and databases, including Bigdough, the industry-leading source for institutional contacts and profiles.

Upcoming Events

Enter keyword search here

Today From: 5/26/2011 To: 5/26/2011 Filter

Date	Event Name	Event Type
5/23/2011	Hawaiian Electric Industries, Inc	Deal Roadshow
5/25/2011	HK/Singapore Conference	Conference
5/25/2011	Maxim Integrated Products, Inc (MXIM) in Boston	Company Marketing
5/26/2011	Singapore/Hong Kong Conference	Conference

Research - Thursday, May 26, 2011

Date / Time	Analyst(s)	Symbol(s)	Title
5/26/2011 11:21 AM	Butler(D)	YHOO	Technology News
5/26/2011 8:22 AM	Ballard(R)	AAPL	Sample Research Document
5/26/2011 4:47 AM	Atkins(); Ballard (R)	AAPL; GOOG	Our Best Investment Ideas

Account Commissions Summary (as of Wednesday, May 25, 2011)

Coverage Priority: Primary Currency: USD FX Rate Type: Daily Close Rate FX Rate Provider: DATAPHILE

Date Option: Calendar YTD Filter

Customer Name	Daily Commissions	MTD Commissions	YTD Commissions
Argonaut Capital Management		1,200	1,620
Carlson Capital LP		3,020	13,402
Diamondback Capital Management		248,062	742,896
Fidelity Management & Research	239	326,922	1,443,509
Great Point Partners, LLC		20,260	115,096
Highbridge Capital Management		31,214	259,524
Jennison Associates			83,176
Level Global Investors		1,750	105,469
Moon Capital Management			24,788
Polyoon Investment Partners		16,328	89,349
Putnam Investment Management		32,980	85,587
Satellite Asset Management		18,690	102,938
Wellington Management Company	23,081	211,655	1,356,790
York Capital Management		28,143	57,484
Total:	23,320	940,224	4,481,628

Pending Call Requests

This Calendar Year From: 1/1/2011 To: 12/31/2011 Filter

Edit	Contact	Primary Phone	Company	Account Tier	Assigned To	Due Date	Requested By	Requested Date	Symbols	Requestor Comments
	Browse, Timothy	987-654-3210	BlackRock Advisors, LLC		Gratton, Nicholas	5/4/2011 11:32:11 AM	Goldstein, Jacob	5/4/2011 11:32:11 AM		plz assign coverage
	Browse, Timothy	987-654-3210	BlackRock Advisors, LLC		Ballard, Rich	1/18/2011 1:35:55 PM	Goldstein, Jacob	1/18/2011 1:35:55 PM	AAPL	please call this afternoon
	Cooper, Aaron	987-123-4567	Fidelity Management & Research	Top	Ballard, Rich	1/18/2011 1:33:14 PM	Goldstein, Jacob	1/18/2011 1:33:14 PM	AAPL	please call

My Meetings

This Month From: 5/1/2011 To: 5/31/2011 Filter

Date	Event	Meeting Type	Meeting Status	Location/Address	Contact(s)/Company	Account Tier
5/10/2011 10:00:00 AM	Analyst Marketing Trip	One-on-One	Confirmed	2929 Arch St., 16th Fl. Philadelphia, PA 19104	Callan, Thomas P. - BlackRock Advisors, LLC	

Sales

- z Dynamically generate prioritized lists of "interested" clients and prospects based on triggers (morning call stocks, analyst recommendation changes, actionable items)
- z Direct analysts to make phone calls to your priority clients
- z Generate individual or blast emails from your contact lists with a single click
- z Call a selected contact with the click of the mouse

Research

- z Manage your sales call requests and contact list calling from a single interface
- z Automatically dial your clients with the ability to leave a prerecorded voicemail, saving minutes per call with the Instant Daytime Dialer service
- z Automatically alert the account coverage team when you have reached their clients

Working Call List

Edit List Remove Contact Clear List Select All De-Select All

<input type="checkbox"/>	Contact	Primary Phone	Company	Ran	Account T	Primary Email	Title	Job Function
<input type="checkbox"/>	Alexander, Ted	+44-20-1234-56	Neptune Investment Management,	12	Top	client@bdvision		Analyst
<input type="checkbox"/>	Boston, Gary	654-321-9876	ABP Investments	0	Core	client@bdvision	Research Analyst	Research
<input type="checkbox"/>	Callan, Thomas	258-741-3214	BlackRock Advisors, LLC	0		client@bdvision		Analyst, Portfolio Manag
<input type="checkbox"/>	Chaillat, Louis	+31 20 145 321	ABP Investments	0	Core	client@bdvision	Controller	Operations
<input type="checkbox"/>	Fitzpatrick, Willia	963-852-7410	Adage Capital Management, L.P.	0		client@bdvision		Trader
<input type="checkbox"/>	Johnston, Roy	212-102-7530	Oppenheimer Capital	154	Top	client@bdvision	Research Analyst	Research
<input type="checkbox"/>	Joyce, Suzanne	212-741-8965	Fidelity Management & Research	7	Top	client@bdvision		
<input type="checkbox"/>	Kao, Stephen	321-456-9630	Julius Baer Investment Manageme	80		client@bdvision		
<input type="checkbox"/>	Kennedy, Scott	617-654-9876	Wellington Management Company,	0		client@bdvision		Research Associate

Requested Calls Dates: This Calendar Year From: 01/01/2011 To: 12/31/2011

Edit Request Complete Request Delete Request Reject Request

<input type="checkbox"/>	Contact	Primary Phone	Company	Rank	Account Tier	Assigned To	Requested By	Requestor Comments	Priority
<input type="checkbox"/>	Cooper, Aaron	987-123-4567	Fidelity Management & Research	7	Top	Ballard, Rich	Goldstein, Jacob	please call	Normal
<input type="checkbox"/>	Browse, Timothy	987-654-3210	BlackRock Advisors, LLC			Ballard, Rich	Goldstein, Jacob	please call this afternoon	Normal

About Ipreo

The marriage of deep industry expertise and dynamic innovation, Ipreo brings market-leading intelligence, robust technology, and superior customer service to all participants in the global capital markets. Bringing together state-of-the-art new issuance systems and premier global financial and investor data, Ipreo provides innovative technology and superior insights to all participants in the capital-raising process.

Ipreo North America

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Sales and Trading

- z Dynamically generate a list of trading contacts based on past activity and positions
- z Monitor actions on the stocks you trade; get unprecedented transparency on the information flow that impacts trading
- z Create and manage your own prioritized calling lists based on holders, expressions of interest and your calling efforts
- z Share your contact lists with the sales force to help focus your calling efforts

Quick Filter

Dates: **Trailing 6 Months** From: **11/01/2010** To: **04/30/2011**

Symbol(s): **AAPL GOOG INTC**

Sources: Trades Actions Holdings Interest Lists

Search Reset Edit Contact List Actions Meetings Trades Holdings Interest Lists Commissions

Contacts

	Company	Contact	INT	ACT	HLD	TRD	Primary Phone	Primary Email	Account Tier	Rank
<input type="checkbox"/>	ABP Investments	Boston, Gary					854-321-9876	client@bdvision	Core	25
<input type="checkbox"/>	ABP Investments	Chaillet, Louis					+31 20 145 3210	client@bdvision	Core	25
<input type="checkbox"/>	Adage Capital Management, L.P.	Fitzpatrick, William					963-852-7410	client@bdvision		2
<input type="checkbox"/>	BlackRock Advisors, LLC	Callan, Thomas P.					258-741-3214	client@bdvision		4
<input type="checkbox"/>	Fidelity Management & Research	Joyce, Suzanne					212-741-8965	client@bdvision	Top	7
<input type="checkbox"/>	Julius Baer Investment Management	Kao, Stephen					321-456-9630	client@bdvision		80
<input type="checkbox"/>	Neptune Investment Management, LTD	Alexander, Ted					+44-20-1234-5678	client@bdvision	Top	12
<input type="checkbox"/>	Oppenheimer Capital	Johnston, Roy					212-102-7530	client@bdvision	Top	154
<input type="checkbox"/>	Wellington Management Company, LLP	Kennedy, Scott					617-654-9876	client@bdvision		5

Thomas P. Callan, CFA (Tom) Buy/Side

Generate Tear Sheet Fix Data

Job Function: **Portfolio Manager, Analyst**

Account Name: **BlackRock Advisors, LLC (Institutional Client)**

Address: **2929 Arch St., 16th Fl., Philadelphia, Pennsylvania, 19104, United States**

Phone: **258-741-3214**

Primary Email: **client@bdvision**

Primary Phone: **258-741-3214**

Fax: **258-741-3215**

F-mail: **client@bdvision**

BigDough Email: **client@bdvision**

Business: **258-741-3214**

BigDough Telephone: **258-741-3214**

Sales: **Goldsten (J)**

Trading: **Fan (W)**

Type	Market Cap	Industry Micro	Industry Mid	Industry Macro	Style	Strategy	Region	Country	Orientation	EO Instrument
	Large Cap, Mega Cap, Mid Cap, Small Cap	Computers and Computer-Based Systems, Consumer Electronics Retail, Data Storage and Peripherals, Delivery Services, Sporting Activities	Biotechnology and Pharmaceuticals, Media, Semiconductors, Telecommunications		Growth		Africa, Asia, C. America/Caribbean, Europe, Middle East, North America, Pacific, South America		Active	

Date	Actions	Status	Type	Symbols	Completed By	Comments
5/25/2011 10:28:47 AM	Email	Completed	Sent E-Mail		Goldsten, Jacob	Morning Summary 5/25/11
5/6/2011 12:22:43 PM	Call	Completed	Voice Mail	AAPL, GOOG, INTC	Goldsten, Jacob	test

Investor Profiles and Lists

- z Leverage detailed investment profile information on your clients, including geographic preferences, industry coverage, investment styles, market cap specialization, to make sure you are targeting your ideas to the right audience
- z Simply and easily import client interest lists
- z Maintain detailed customized research subscriptions for your clients; send them only the research they really want
- z Centralize intelligence on your accounts so salespeople can back each other up when they are travelling
- z View detailed holdings by management company and fund

Event Manager

- z Create and schedule marketing events across any number of dates, locations and time zones
- z Provide the sales force with real-time access to research analyst and company marketing schedules as they develop
- z Allow management to review and approve meeting requests, determine client prioritization and arbitrate scheduling conflicts
- z Notify the sales force of new events, new meetings available, meetings approved, meetings denied and scheduling changes
- z Export event management and scheduling details into Microsoft Outlook
- z Provide analysts with a real-time view of their marketing schedules as they are developed

Analyst Marketing Trip > Schedule Overview

Schedule Overview Meeting Planner Meeting Availability Event Documents Event Notes Meeting Attendees

View: Schedule Overview

IPREO
Analyst Marketing Trip
Tuesday, May 10, 2011

Rich Ballard KG Capital Corporation (c) 617.953.8995

Time / Sales Sponsor	Account Information:	Client Information:
7:00 AM Car Service	Car to first meeting location Reservation Name: ABC Travel Service Reservation #: +1 888 123-4567	Rich Ballard
7:30 AM One-on-One		
8:45 AM One-on-One		
10:00 AM One-on-One	BlackRock Advisors, LLC Tom Callan 2929 Arch St., 16th Fl. Philadelphia, PA 19104 258-741-3214	
11:15 AM One-on-One		
12:30 PM		