

## BD Vision Research Distribution Module and Vision Mail

### BD Vision Research Distribution Module

#### Centralized Research Management

- z Control distribution of research to maintain a standard message to all clients
- z All research is distributed identically, prohibiting personalised comments from individual senders, alleviating the risk of compliance violations

#### Research Library

- z Centralized, searchable warehouse of all research communications
- z Search the library by sector, industry, company or analyst, within user-defined time-frames
- z Integration with research publication tools – automatically populate documents and meta-data in the Vision Research Library through a RIXML feed from your choice of industry-standard providers

Date / Time	Analyst(s)	Symbol(s)	Title	Document Type	Product
12/3/2008 12:29:19 PM	Doe(J)	GOOG	Company Note	NOTE	Note
11/14/2008 11:42:07 A	Doe(J)	YHOO	Today's Note	NOTE	Note
11/7/2008 11:00:58 AM	Doe(J)		Today's Report	Report	Report

Product Name	Criteria	Method	Quantity	Updated By	Updated Date	Created By	Created Date
Report	Consumer & Food Retail	E-mail	1	Smith, Jane	12/18/2008	Smith, Jane	12/18/2008
Report	Economic Research	E-mail	1	Johnson, Ron	12/18/2008	Johnson, Ron	12/18/2008
Report	Energy & Natural Resources	E-mail	1	Smith, Jane	12/18/2008	Smith, Jane	12/18/2008

Sector	Industry	Owner	Report E-mail
Consumer	Restaurants		<input type="checkbox"/>
	Small & Mid-Cap Consumer		<input type="checkbox"/>
	Specialty Apparel		<input type="checkbox"/>
Consumer			<input type="checkbox"/>
Diversified Industrials			<input type="checkbox"/>
Economic Research			<input type="checkbox"/>
Energy & Natural Resources			<input checked="" type="checkbox"/>
Financial Institutions			<input checked="" type="checkbox"/>
Financial Institutions			<input type="checkbox"/>

#### Research Subscriptions

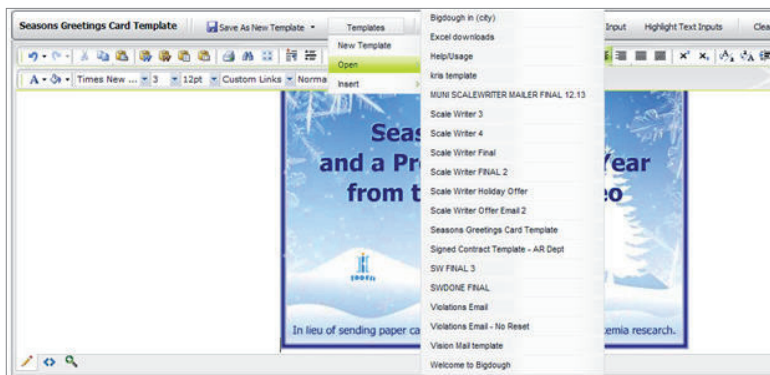
- z Contact-specific research subscription management and automatic document distribution upon publishing
- z Set subscriptions at the contact level based on industry, sector, ticker or analyst
- z As documents are published to the Research Library, centralized distribution occurs to all subscribed contacts without further interaction necessary by analysts or the sales force
- z Send Research content embedded in an HTML email, as a link, or in a PDF attachment based on your policies and the client's preferences

### Vision Mail - Manual Research Distribution

#### Tracking & History

- z Identify which clients have opened and read your research and e-mails to prioritise sales activities
- z Determine if your research is forwarded to third parties by your clients
- z View the last time your clients viewed each report you published
- z Count the number of times each client has opened a report

Sent Date	Author(s)	Sy	Title	Product	View	Last Read	Read Count
11/18/2008 3:06:44 PM	Smith, Jane		<a href="#">Company Note</a>	Note	<a href="#">View</a>	11/18/2008 4:43:05	8
11/18/2008 3:06:44 PM	Smith, Jane		<a href="#">Today's Note</a>	Note	<a href="#">View</a>	11/20/2008 6:03:01	3
11/18/2008 3:06:44 PM	Johnson, Joe		<a href="#">Research Report</a>	Report	<a href="#">View</a>	11/23/2008 11:14:01	2
11/18/2008 2:25:34 PM	Johnson, Joe		<a href="#">Today's Report</a>	Report	<a href="#">View</a>	11/29/2008 9:05:11	0

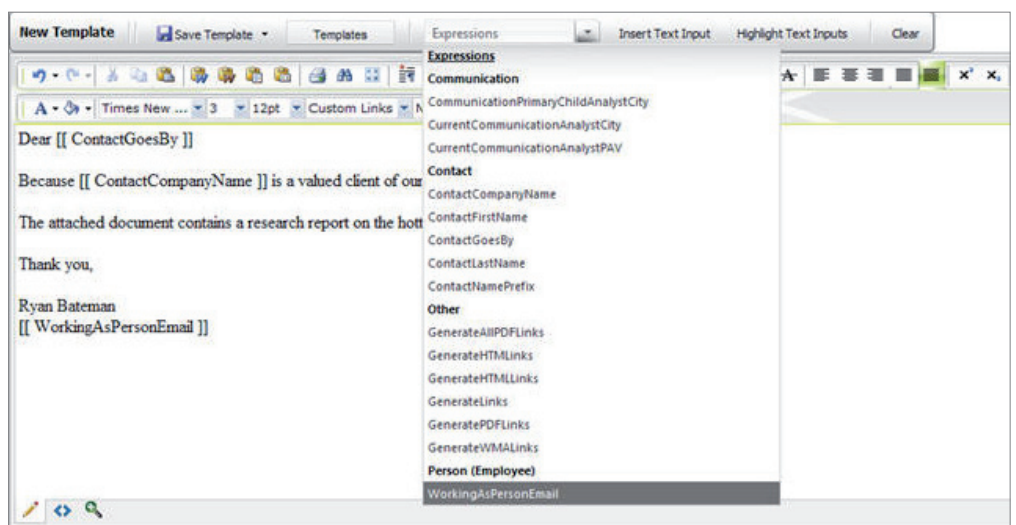


#### Templates

- z Quickly and easily maintain and update an unlimited number of customizable document templates for client distribution
- z Effortlessly embed rich HTML content display in recipient's Outlook window
- z Embed brand logos and apply other formatting within templates for Research, Corporate Access, Events or any other corporate communications

#### Personalization

- z Personalize messages to individual recipients based on client name or nickname, company and many other fields



#### 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.