

Equity Research Case Study

A regular function within a financial institution, are equity valuation and forecasting of companies they invest in. Over the last few years leading US listed companies have been disclosing their quarterly statements in a machine readable format known as eXtensible Business Reporting Language (XBRL). At present there are thousands of filings available, the issue for this financial institution is to get only the information that they need, retrieve actionable business intelligence and make it available to the various groups within the institution who all want different things from the data.

- Equity Analysts – looking at historical performance
- Private Wealth Manager – responsible for managing a portfolio of equities covering a wide group of sectors
- Tax Analyst – interested in tax mitigation strategies used by the company.

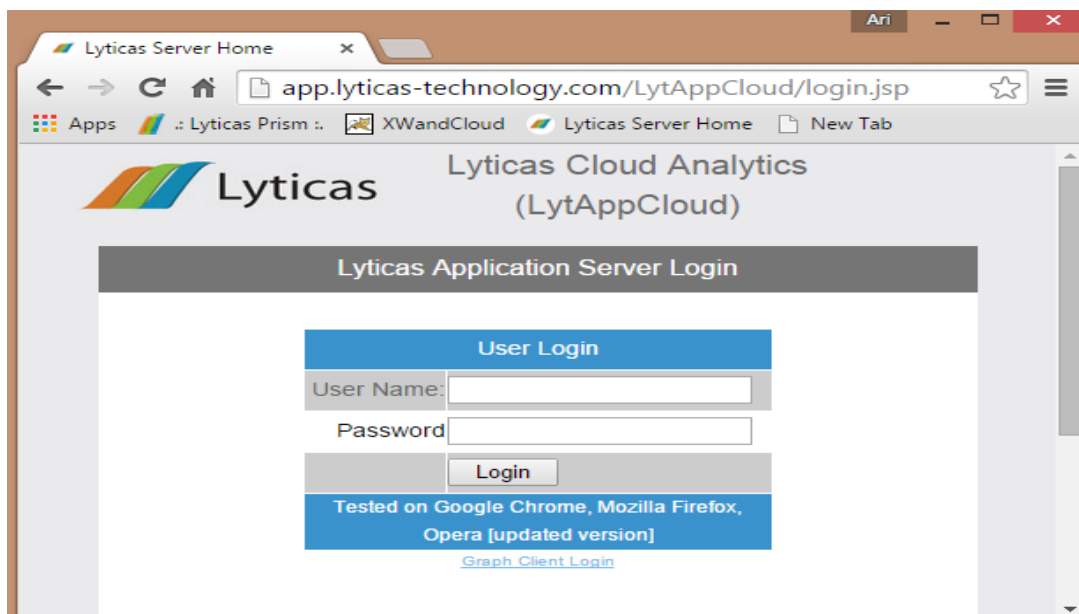
Normally the financial institution would go to their business intelligence unit who would liaise with the I.T department who would build a prototype in 3 months and spend a further year refining it. However what if the financial institution chose the Lyticas Product Suite from Apurba Technology Inc?

We have Steps 1 to 10 can be done in minutes rather than hours and repeated over and over. Giving the organisation a competitive edge in equity, valuation and forecasting and we haven't began to talk about the benefits of connecting to all those other data sources.

Here is what would happen...

Step 1: Lyticas Technology Ltd would set up a Private Cloud instance of the Lyticas Product Suite for the financial institution

Step 2: Lyticas Technology Ltd would train the business intelligence team to use the Lyticas Product Suite to build their repository. The first thing is to logon onto LytApp Administration interface.

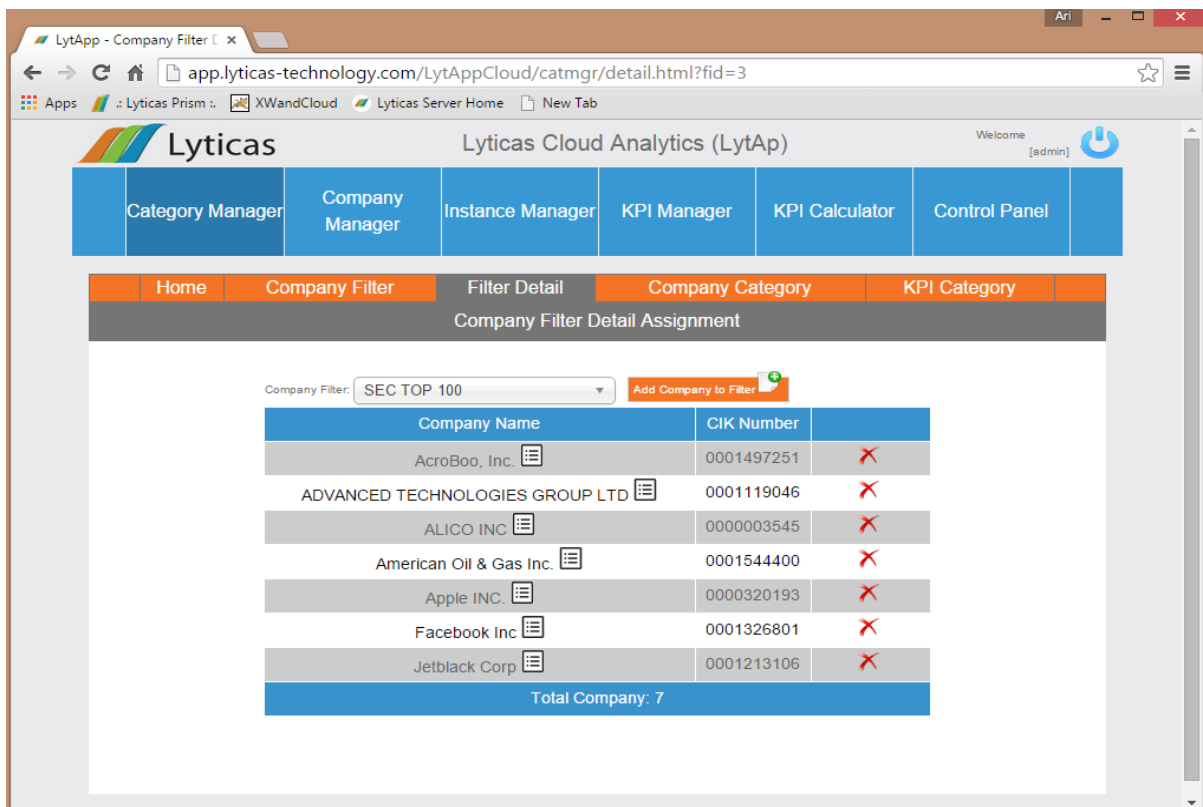


Step 3: Set up the companies. This step is something you won't need to do that often which is to set up your list of companies

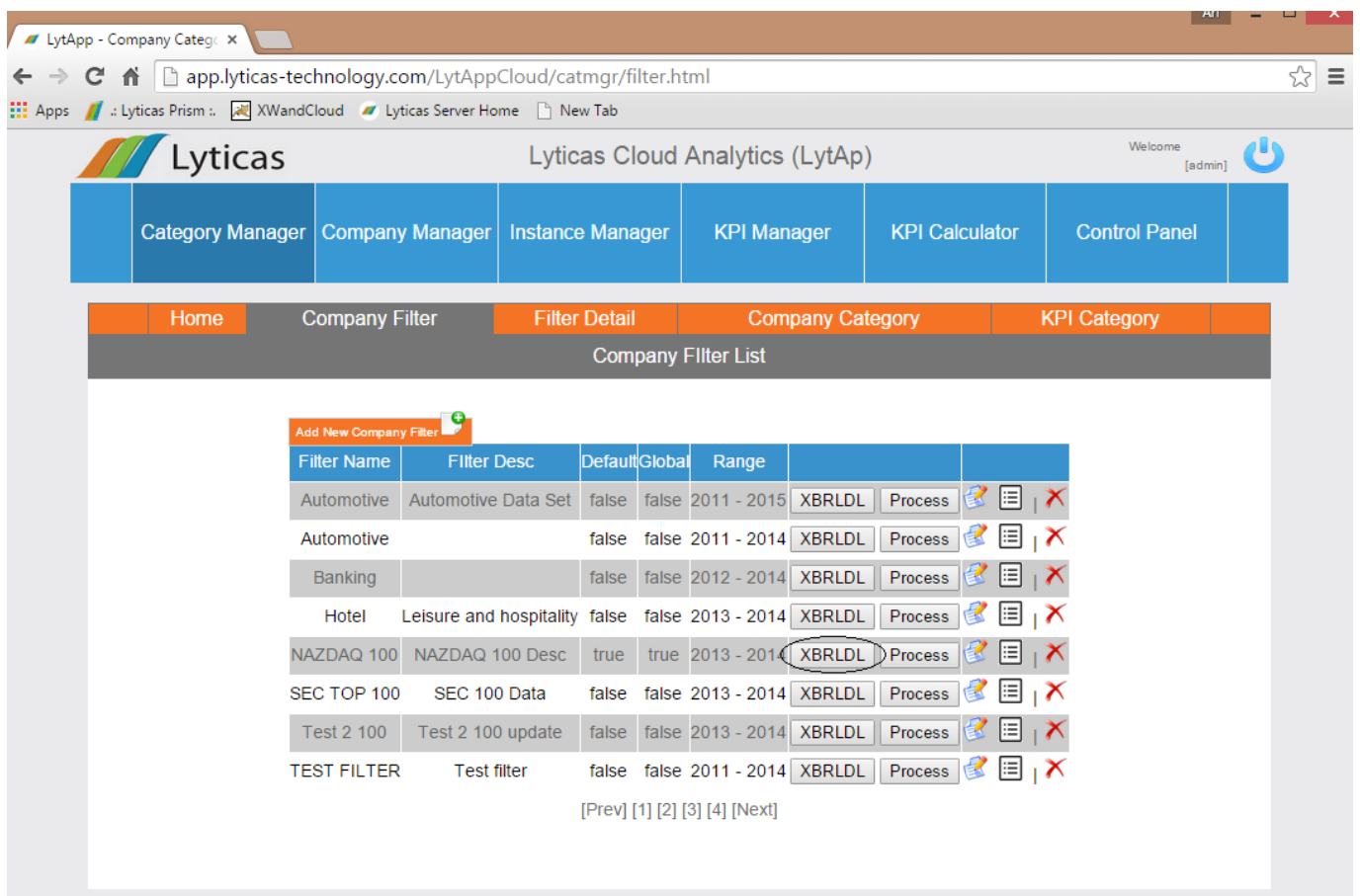
The screenshot shows the Lyticas Cloud Analytics (LytAp) web application. The top navigation bar includes 'Category Manager', 'Company Manager', 'Instance Manager', 'KPI Manager', 'KPI Calculator', and 'Control Panel'. The 'Company Manager' section is active, displaying a 'Company List' table. The table has columns for Company Name, CIK Number, SIC, FY End, and Category. Each row includes a document icon and a red 'X' icon for management actions. An 'Add New Company' button is located at the top left of the table.

Company Name	CIK Number	SIC	FY End	Category
A&C United Agriculture Developing Inc.	0001539778	100	0930	Financials
ABSOLUTE POTENTIAL, INC.	0001002360	2851	0930	Financials
AcroBoo, Inc.	0001497251	7389	0630	Financials
ADVANTAGE TECHNOLOGIES GROUP INC	0000874292	5000	0930	Financials
ADVANCED TECHNOLOGIES GROUP LTD	0001119046	9995	1231	Financials
AERIE PHARMACEUTICALS INC	0001337553	2836	1231	Financials
ALICO INC	0000003545	100	0930	Financials
ALLBRITTON COMMUNICATIONS CO	0000889156	4833	0930	Financials
Alternative Energy & Environmental Solutions, Inc.	0001504239	2836	1231	Financials
ALTERNET SYSTEMS INC	0001126003	7372	1231	Financials
Amazon.com, Inc	0001018724	5961	1231	Financials
AMBICOM HOLDINGS, INC	0001444310	3829	0731	Financials
AMERICAN EAGLE OUTFITTERS INC	0000919012	5651	0128	Financials
American Oil & Gas Inc.	0001544400	1382	0131	Financials

Step 4: Download your data. Create your download set. This is important as each download set corresponds to a KPI processing set. We have organized it this way because you may want to retrieve different KPI's for particular industries



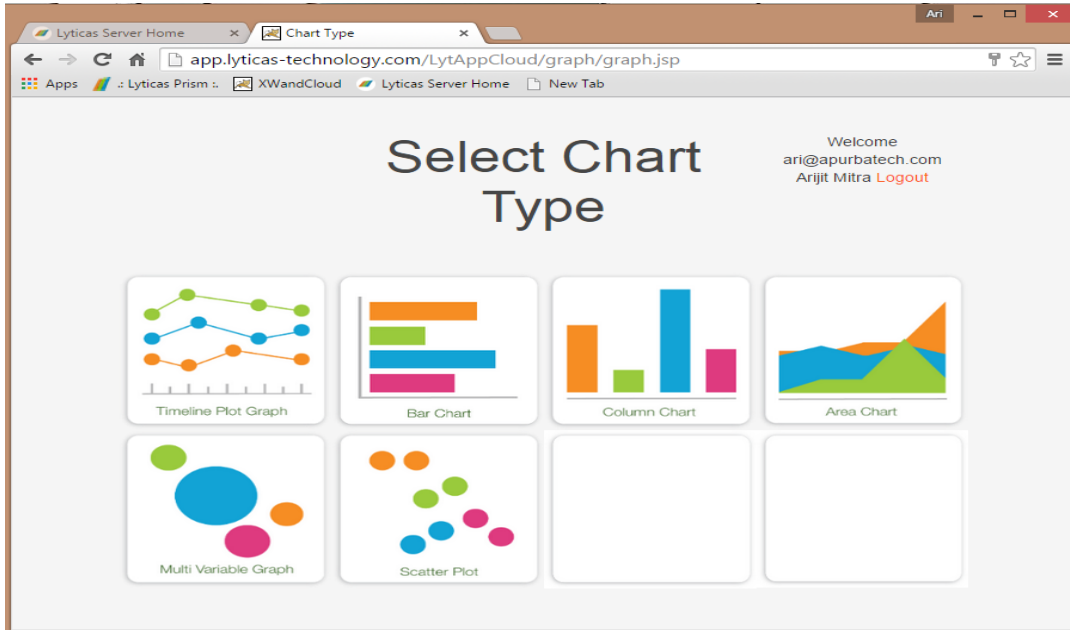
Step 5: Simply select XBRLDL. This begins the download process.



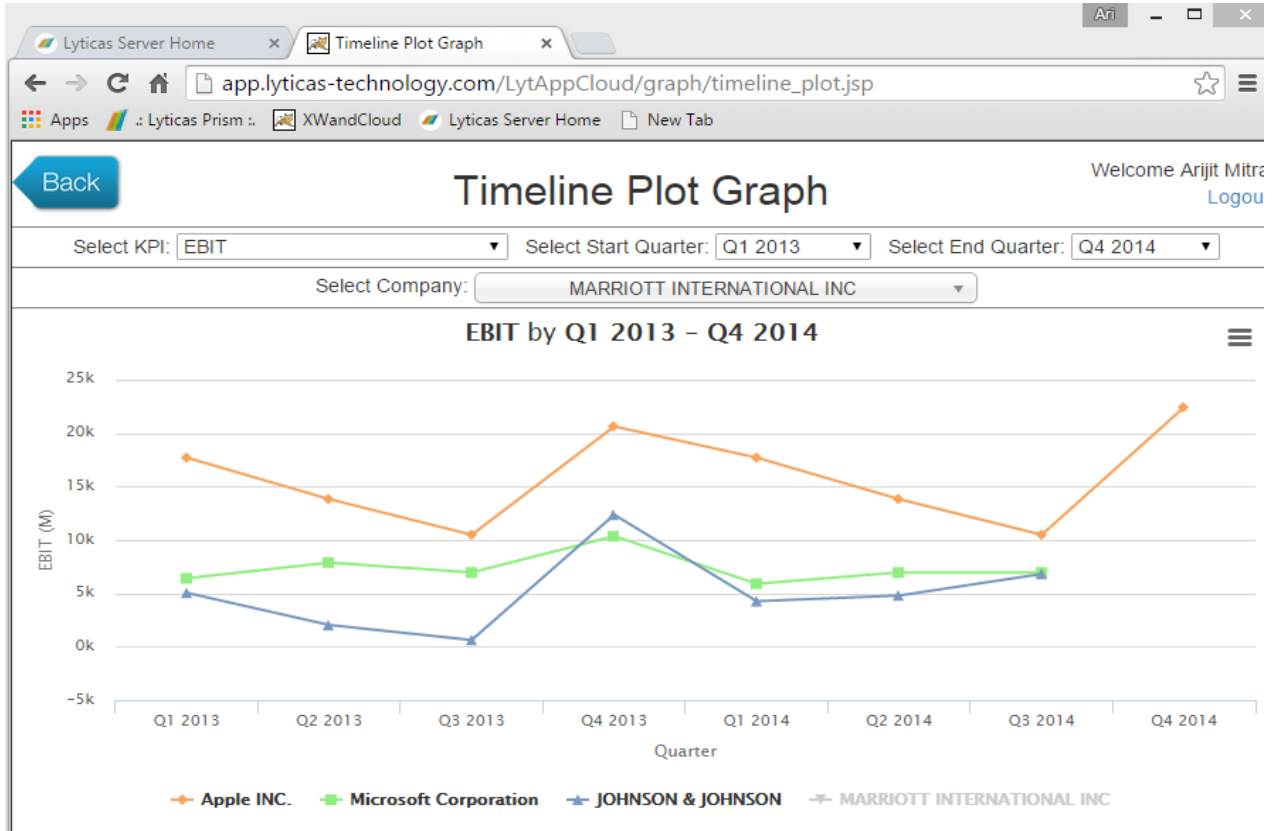
Step 6. Select the Process button, retrieves standard industry KPI. Creating custom KPIs can be done in the KPI manager.

Step 7: Let the team know that the data is ready and that they can view the results on Lyticas Prism

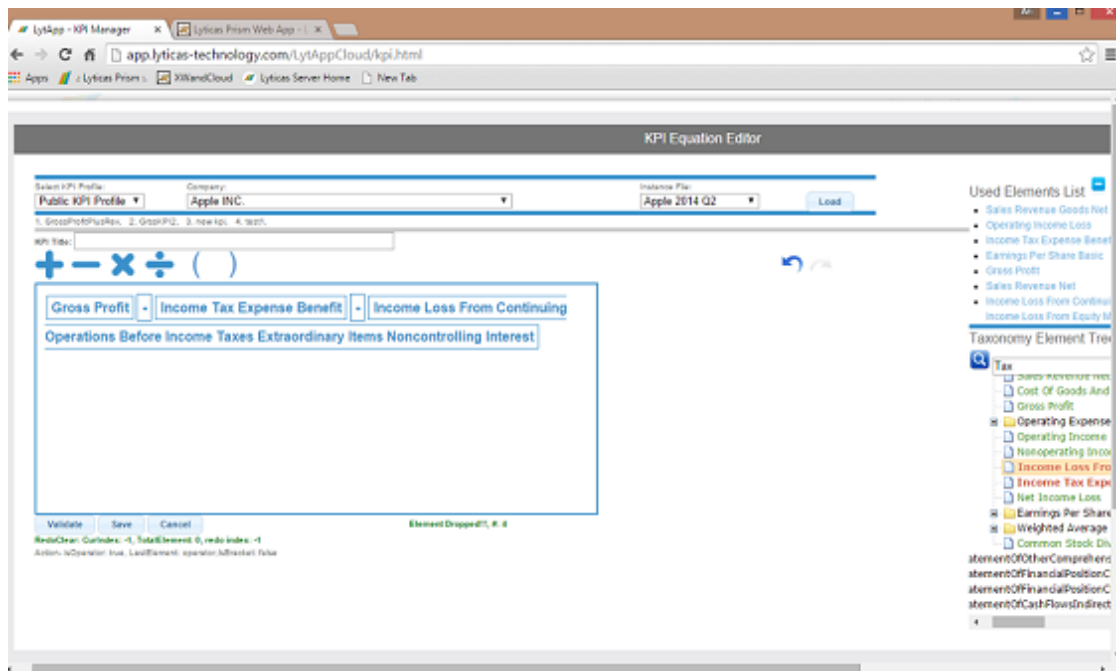
Interface.



Step 8: Begin Comparing. Here we have a scenario encountered by the equity analyst and private wealth manager.



Step 9: A Tax analyst requires a specialist KPI. They access the KPI Manager and design a new KPI, by drag and drop. Lyticas takes care of the XBRL so the Tax analyst can get on with their job.



Step 10: Validate, Execute and Run