Thomson ONE Wealth

Empowering advisors with intuitive, integrated and scalable solutions

LSEG DATA & ANALYTICS

Thomson ONE suite

We know that success in wealth management depends on the quality of data that underlies each decision – from onboarding and creating proposals to managing portfolios and fostering relationships – which is why our robust content and analytics are at the core of the platform. **Data is the powerhouse of Thomson ONE**.

Thomson ONE Wealth empowers advisors with world-leading content and an intuitive workflow, enabling the delivery of personalized advice for financial wellbeing.

A complete front-to-back-office workflow solution, Thomson ONE can seamlessly integrate with existing in-house and third-party applications for effortless navigation. This enables firms to scale and adapt to an ever-changing environment with ease and agility.

Industry trends

Today's advisors need to be –

SELF-DIRECTED

Gain insight into the market and assess investments with the full story in one place. Research companies and stay on top of breaking news on one platform.

CLIENT-FOCUSED

See how the market affects your clients' accounts. Gaining the advantage of context and real-time data in one clear view, you can share investment insights to engage your current clients and attract new ones.

FLEXIBLE

Stay on top of market data, news and client portfolios from home, in the office or on the go. Our web-based mobile app gives you easy access to the market any time, anywhere – syncing up our watchlists and entitlements.

Market insights

Track how the market affects your book of business

Monitor the market

When an unexpected event unfolds, you can quickly assess its potential impact on your book of business. Sophisticated market-monitoring tools allow you to compare performance against benchmarks, view sector contributions and visualize changes in a client's portfolio.

Market intelligence

Gain insights into factors driving the market with Thomson ONE's global market data, including real-time and historic pricing, indices, options, futures, FX rates, economic indicators, industry and sector information, volume at price, short interest, reference data and more.*

Identify trends with Thomson ONE's market-leading advanced charting package. Get a clear view of historical movements on a security or index, compare peer performance, visualize the impact of specific events and apply moving averages or other indicators.

Receive real-time alerts to stay on top of critical events such as price or volume changes, liquidity events, filings, research, news or account activity.

* Real-time exchange data is fee-liable.

News

Read the day's most important stories in Top News, track corporate activities with press releases, watch market activities and trends with LSEG Newscasts and receive daily newsletters *The Morning News Call and The Day Ahead*.

Separate the news from the noise using analytics-based tags to pinpoint stories of interest. Search across news, research and filings by symbol or watchlist.

ADD-ON

Reuters News

Reuters News delivers real-time news on the companies that matter. Gain deeper insight into market movement and the activities of the 41,000 companies that our 2,500 Reuters journalists cover.

From Reuters Stocks Buzz, analysis of hot stocks, sectors, people moves and other company-impacting changes in a bullet-point format, to Breaking views insights, analysis and commentary, Reuters News gives you ideas that align with your clients' goals.

Differentiate on insights

View a company from every angle

Research companies

- Expand your knowledge of a client's holdings with LSEG's depth and breadth of company data
- View events, ownership and holdings, filings and insider data to unpack how events affect a company's stock price
- Enhance your company analysis with estimates, fundamentals, earnings, ESG scores, ratings, analytics and peers
- Add depth to your story with LSEG research, your firm's own proprietary research or independent research

ADD-ON

Stock Reports Plus

Generate ideas and access objective research to gauge the health of a company from a single Stock Reports Plus score. We combine our independent research, ratings and market data to create a score that weights earnings, fundamentals, relative valuation, risk, price momentum and insider trading.

ADD-ON

CFRA

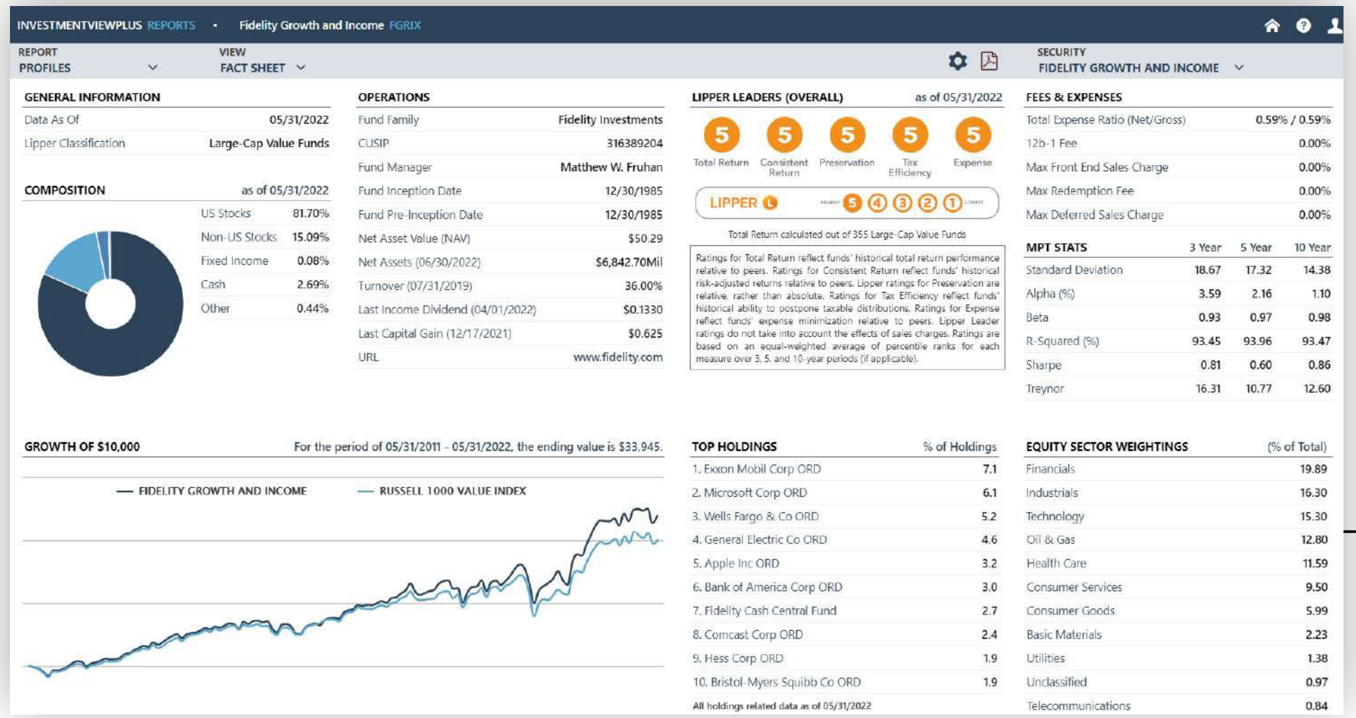
CFRA Equity Research provides fundamental, quantitative and technical data using their proprietary STARS® (STock Appreciation Ranking System) methodology. CFRA equity analysts cover more than 1,500 global stocks, 1,800+ ETFs and 15,000+ mutual funds.

Expand your practice

Foster meaningful relationships with your clients and attract new business

Investment View Plus*

Investment View Plus helps you to initiate meaningful conversations about investing with your prospective and existing clients. Create financial goals, discover funds that match your clients' investment strategies and showcase your expertise through professional grade reports – all in one efficient workflow.

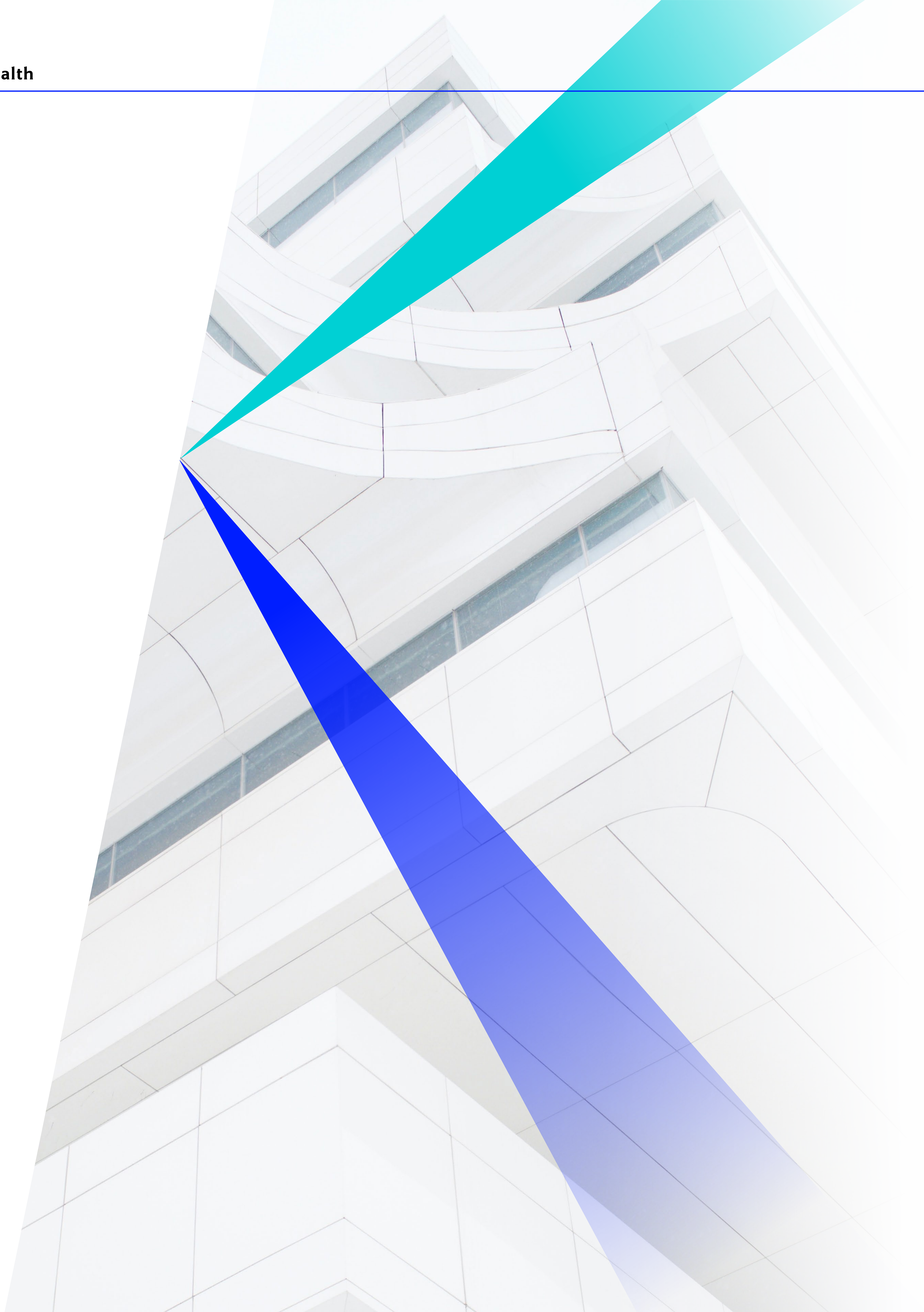


Investment View Plus is powered by Lipper® data to provide quality coverage on open-end and closed-end mutual funds, exchange-traded notes and funds and indices. Through our **Lipper Leader Rating System** and **Lipper Fund Awards** program, advisors can spotlight high-performing securities and illustrate the benefits of investment recommendations.

Key features

- Create and set financial goals with our retirement, education and goal-planning calculators
- Discover securities that help attain those goals by filtering on customised security criteria in our Product Selection
- Support your investment strategies with effective, compliance-ready presentations that are easily understood by advisors and investors alike

* Not available in Canada.



Proposals and Model Manager*

Proposals is an innovative sales proposal tool that allows advisors to create multi-asset investment proposals. Showcase your financial recommendations using LSEG's comprehensive database of mutual funds, ETFs, variable annuities and stocks.

Proposals makes turning recommendations into actionable plans and personalized presentations for clients effortless, helping to build customer confidence and grow assets under management.

Key features

- Produce easy-to-understand, customized reports and sales proposals to meet prospects' and clients' unique needs
- Improve productivity and client experience by delivering multiple advisory products and recommendations in a single proposal
- Provide a holistic view of the client's portfolio using our Deep Asset Class view
- Rebalance your clients' portfolios and make product recommendations based on your custom or firm-level models created using Model Manager

* Not available in Canada.

Thomson ONE solution suite

How you'll benefit

Thomson ONE Wealth is designed around the Advisor workflow, bringing efficiency to key Advisor activities:

- **Instrument selection** for creating proposals and client portfolios
- Price discovery and **investment valuations**, supporting client engagement
- Gain **insights on client's investments**
- **Alerts on market events**, enabling advisors to take action
- **Asset allocation** for client and model portfolios
- Getting **market insights** to structure investment strategy at firm or individual level
- **Research management** activities for new product and investment opportunities

Thomson ONE Wealth

Quick access to market data and news

Global Market Data
- Real-time and historic pricing
- Indices
- Options
- Futures
- FX rates
- Economic indicators
- Volume at price
- Short interest
- Advanced charting
- Alerts and reference data

News
- Press releases
- Top news
- Newscasts (videos)
- Newsletters

Thomson ONE Anywhere
- Stay informed by phone or tablet while on the go

Company information
- Fundamentals
- Estimates
- Ratings
- Filings
- ESG scores
- Events
- Ownership
- Management info

Thomson ONE Wealth Select

Create winning investment proposals

Thomson ONE Wealth plus

Stock Reports Plus
- A single score for equity analysis and idea generation

Investment View Plus
- Investment selection, goals-based planning
- Lipper ratings

Proposals
- Client-ready proposals

Thomson ONE Total Wealth

Seamless front-to-back-office workflow

Thomson ONE Wealth Select plus

Book management
- Manage the market's impact on your client portfolios with an actionable view of wealth and tasks

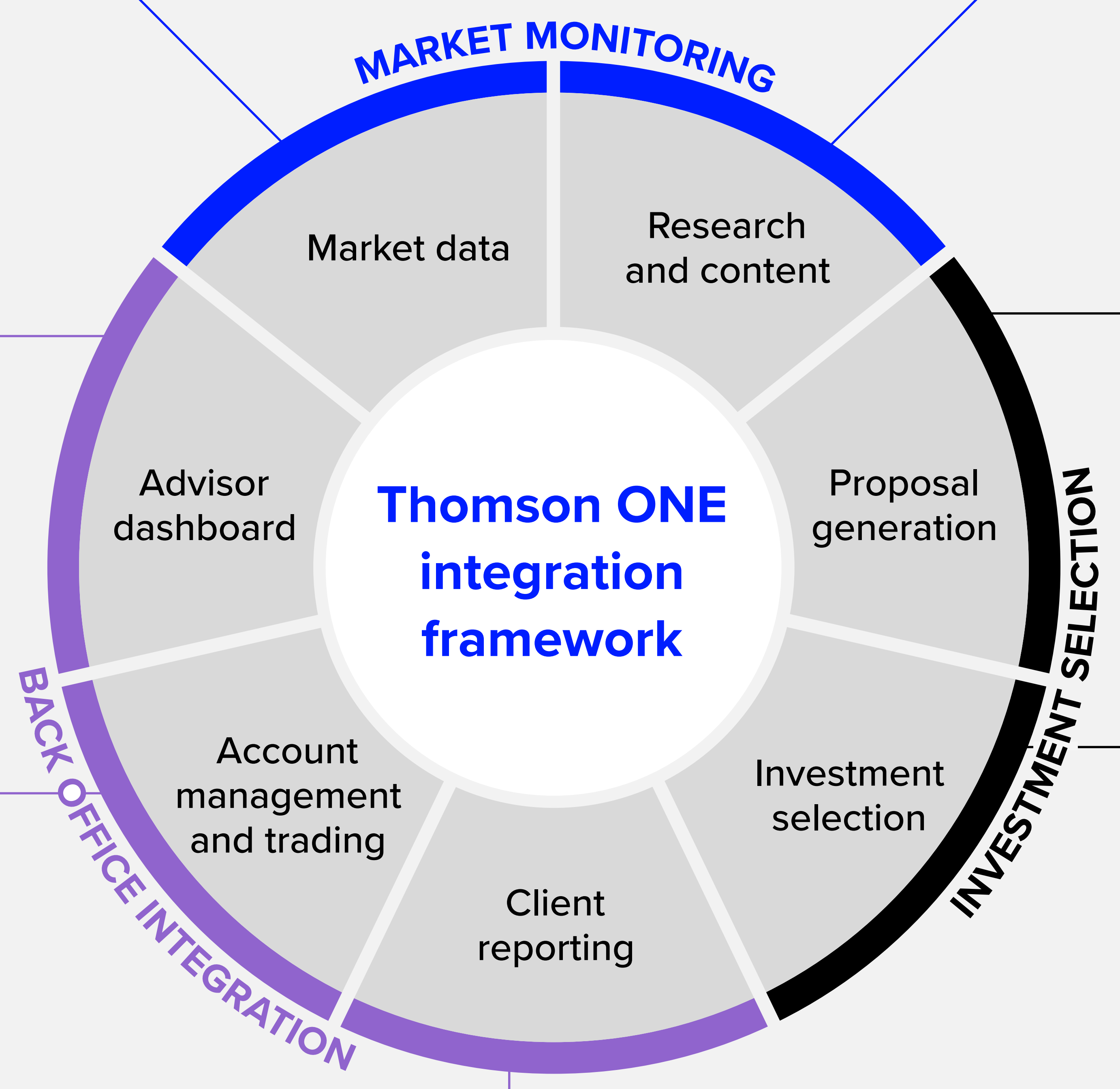
Client reporting
- Portfolio analysis and Client Review reports in client-ready format

Integration

(For clients with over 500 users)

Create custom workflows by combining internal, third-party and LSEG services. Our flexible framework and advanced enterprise management tools enable you to tailor the platform to the needs of your advisors.

Maximize Thomson ONE's flexibility to meet your unique needs



- Symbol monitor
- News
- Interactive charting
- Derivatives
- Fixed income
- Market indices
- Structured products

- Analyst research
- Independent research
- Events and calendar
- Fundamentals
- Ownership
- Filings

- Advisor dashboard
- Alert suite
- CRM integration

- Investment proposals
- Wealth planning
- Stock Reports Plus
- Model management
- Rebalancing
- Drift reporting and alerts

- Account management
- Basket and block trading
- OMS integration
- Global execution
- Transaction monitoring
- Document managment

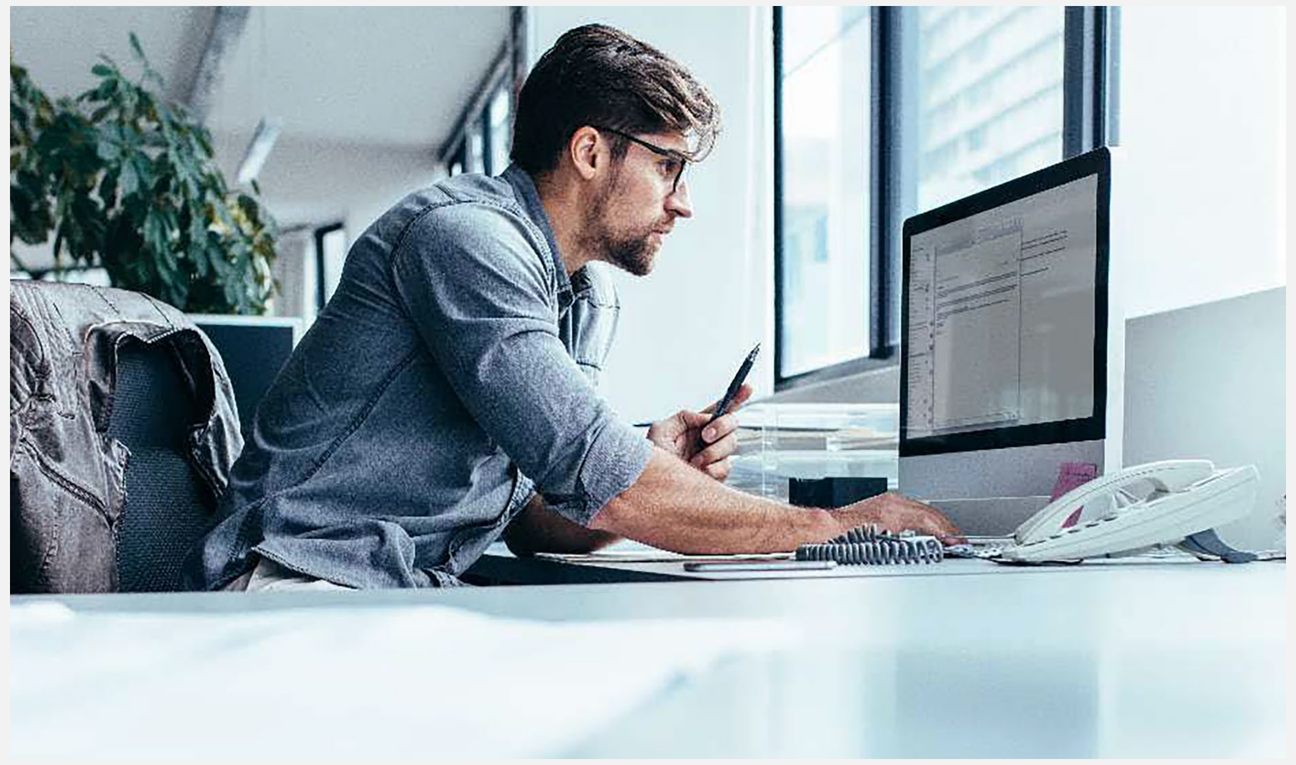
- Product selection tools
- Hypothetical illustrations
- Goals-based planners
- Lipper integration

- Performance reporting
- Statement generation
- Compliance workflow

Support structure

LSEG understands your business

Our fully integrated delivery teams have deep knowledge of our customers' challenges and the end-to-end advisor workflow. They have the expertise to help you take advantage of the full value of LSEG solutions.



Implementation

Our Implementation team ensures technical readiness and manages implementation of the technical solution.

Engagement

Customer Success Managers are your partners and dedicated advocates within LSEG.

They guide you through the onboarding process, ensure you have access to all support channels and share best practices, insights and educational resources.

Support

Our help desks provide 24/7 support covering content, functionality and technical needs.

The My Account self-service portal gives you a personalised entry point to answers, product resources, notifications, software downloads, support and billing.

Thomson ONE Wealth

LSEG understands your business

Wealth is all about people – your clients. And when every client is unique, off-the-shelf advice is simply off the table.

Our solutions combine world-leading content with an intuitive workflow that lets you deliver personalized advice to every client to achieve greater financial wellbeing.

There is no average investor. This is no average solution.

Learn more about **lseg.com/thomson-one-wealth-solutions**

LSEG DATA & ANALYTICS

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