

Q4 Desktop



The only IR CRM powered by Investor Behavior Tracking.



With changing investor preferences, new regulatory hurdles and the seismic shift to virtual, the way in which the capital markets engage with public companies has been forever disrupted. Investor Relations Officers have adapted, becoming increasingly proactive in communicating their unique value to shareholders.

At Q4, we understand that to build a proactive and impactful program, IR professionals need innovative tools that streamline the collection and synthesis of each and every interaction with the capital markets, transforming data on investor behavior into actionable next steps.

What is Q4 Desktop?

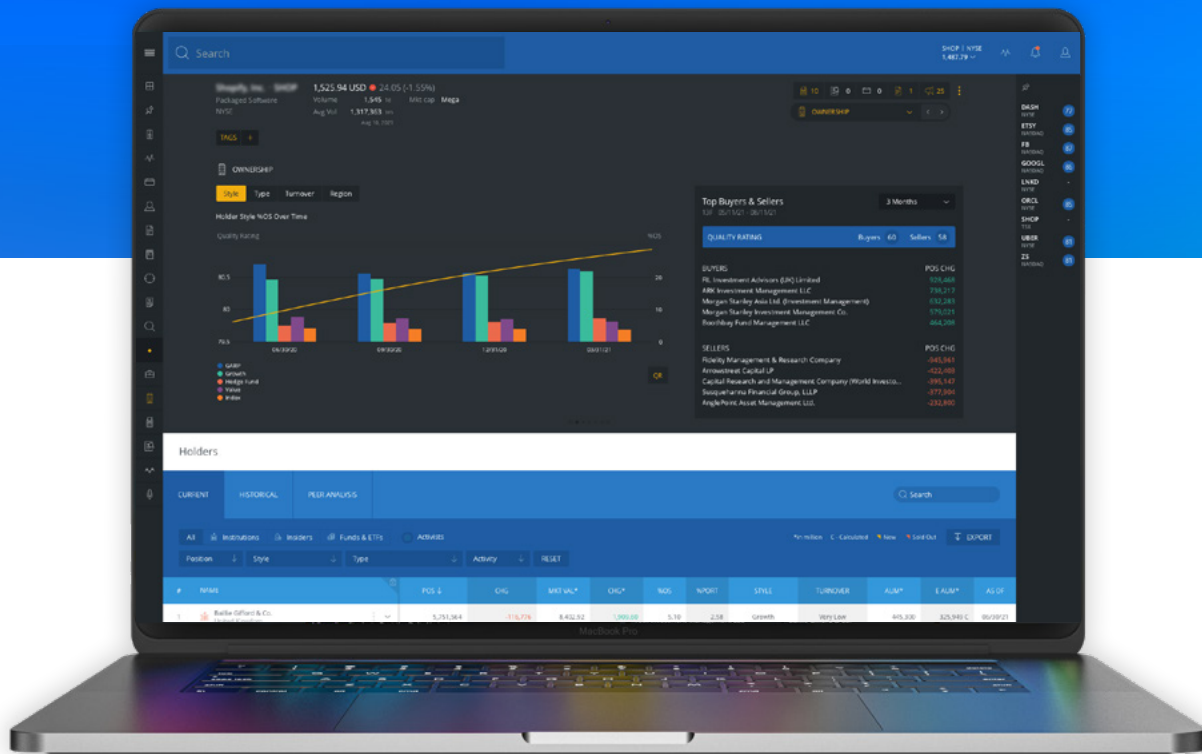
Q4 Desktop was purpose-built for the capital markets as the most comprehensive IR platform on the market. A streamlined experience enables public companies to elevate their daily workflow by connecting investor engagement tracking, targeting, and behavioral analytics across one's website, events and IR content consumption in an intuitive platform.

Using a singular platform, public companies can reinvent how they target new investors, monitor market movements, assess the performance of their IR program vs peers and get ahead of activists with Engagement Analytics.



Transform data into actionable insights.

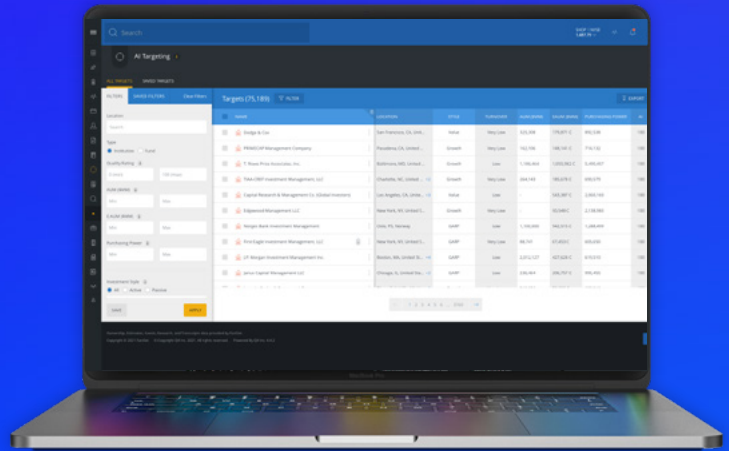
IR programs continue to grow in complexity amidst the array of proactive activities needed to position a compelling investment opportunity. Across non-deal roadshows, earnings calls, conferences, IR websites, and countless other activities, investors are generating data, signaling their intent to invest. With Q4 Desktop, you have the only platform to collect and consolidate data from all engagements revealing contextualized, and actionable insights to drive an outperforming proactive IR strategy.



Q4 Desktop brings together all IR analytics for a 360 degree view of investor behavior including:

- ✓ Ownership Updates & Shareholder ID Changes
- ✓ Peer, Sector and Market Trends
- ✓ Meetings & Activities
- ✓ Investor Engagement Benchmarking
- ✓ Conferences and NDR Engagements
- ✓ Website Visits & Downloads
- ✓ Event Registration & Attendance
- ✓ Peer and Market Cap Content Benchmarking

Connect and prioritize the right engagements.



Target the right investor

Aggregate behavioral analytics across meetings, website visits, event attendance and trading, and leverage AI-backed indicators to engage investors that are most likely to take a position in your security.



Refine your targeting approach

Identify new investors in a growing database of over 320K institutions, funds and individuals. Rethink each targeting exercise by diving deeper into institutions' attributes and exposure.



Scale personalized investor communications

Seamlessly send personalized emails to large groups of stakeholders directly from Desktop without complex third party tools.



Plan with improved insights

Access market leading research and estimates, as well as events and transcripts, ensuring your strategy considers the market's take on you and your peers.



Prepare management for each meeting

Create configurable briefing books exported directly from the Q4 Desktop database and ensure your C-Suite enters each engagement prepared with key investor data.



Improve how you report your impact

Q4 provides a simplified way to generate complete reports for board meetings and ad-hoc updates. Export activity data, shareholder changes and other key insights or take advantage of our exceptional service to customize reports.

Unparalleled customer success.

Whether you require more assistance in proactively engaging the street, or hope to uncover deeper, more meaningful insights about your shareholder base, the Q4 team is uniquely positioned to help you reach and exceed your expectations.



Premium Client Support

Take advantage of an expert team that can help you better leverage our tools and insights and maximize your ability to attract new capital. Desktop clients are each assigned an IR Manager to ensure you get the most out of the platform.

EXAMPLE SERVICES:

- Historical data migration
- Investor targeting reports
- Briefing books for roadshows and conferences
- Board reports and ad hoc executive updates
- Quarterly earnings preparation
- Investor engagement reports

Features

OWNERSHIP

- Premium Ownership
- Stock Quotes and Charts
- Peer Comparison
- Fund and Firm Information
- Live Updating Market Commentary
- News and Press Releases
- Stock Surveillance Integration

CRM

- Customizable Dashboard
- Centralized Activity Tracker
- Pipeline Tool
- Reporting
- Calendar
- Universal Search
- Tagging

TARGETING

- AI-Backed Targeting Tool
- Search by Preferred Filters
- Contact Database (Institution, Fund, Individuals)
- Briefing Book Builder

CRM EMAIL

- Corporate email sync
- Personalized mass communication
- Automatic email tracking in individual contacts

CUSTOMER SUCCESS

- Q4 IR Manager

Q4 GO MOBILE APP

- Mobile activity management and logging
- Ownership trends and analysis
- Contact, institution and fund level search

Additional Features

RESEARCH & ESTIMATES

- Detailed Earnings Estimates
- Consensus
- Up-to-date research reports

EVENTS & TRANSCRIPTS

- Searchable Transcripts
- Earnings/Corporate Events
- Sell-Side Conferences
- Event Calendar

ENGAGEMENT ANALYTICS

- Investor Engagement
- Activist Monitoring
- Peer Benchmarking

Turn Insights into results today.

Q4 is trusted by over 2650 of the worlds leading brands.

LET'S TALK

About Q4 Inc.

Q4 Inc. (Q4) is a leading capital markets communications platform provider that is transforming the way publicly traded companies, investors, and investment banks make decisions to efficiently discover, communicate, and engage with each other. The Q4 end-to-end technology platform facilitates interactions across the capital markets through its IR website products, virtual events solutions, capital markets customer relationship management solution, and shareholder and market analytics tools. The firm is a trusted partner to over 2,650 public companies including 50% of the S&P 500.

Q4 is based in Toronto, with offices in New York and London. To learn more, visit: www.q4inc.com.

- 🖱 q4inc.com
- 📞 (877) 426-7829
- @ sales@q4inc.com
- 🐦 [/q4tweets](https://twitter.com/q4tweets)