



## Q4 Desktop

Simplified Workflow.  
Actionable **Intelligence**.



### Streamline your Workflow

Improve your daily workflows, from logging meetings to building briefing books, with a fully-integrated CRM platform, built to optimize how you manage your entire strategy.



### Meet the Right Investor

Identify, engage, and prioritize the right investor targets every time with a powerful solution that integrates contact-level and AI targeting results directly into your workflow.



### Convert Insights into Action

Drive your strategy with actionable intelligence from the capital markets. With tools to view relative performance, sentiment, and volatility, you can proactively predict investor behavior and build a best-in-class IR program

# List of Features

## Dynamic Natural Language Processing

Live Updating Market Commentary  
Surveillance Updates  
Before and After Market Summaries

## Advanced Search

Contacts  
Firms  
Funds  
Transcripts  
Companies/Securities  
Tags  
Events  
Watchlist  
Activity  
Research

## Collaboration

CRM  
Reports and Briefing Books  
Tagging  
Contact Lists  
Corporate Participants  
Report Builder

## Q4 Hosted Website Analytics

Website Visitors by Institution  
Pages Visited  
Downloads  
Device Types

## Activism

Activism Alarm  
Activism Ownership Flagging

## Universal Data

Stock Quotes  
Stock Charts  
Events and Transcripts  
Ownership  
News and Press Releases

## CRM

Reporting  
Customizable Dashboard  
Quick Search  
Log, Search, Collaborate & Report:

- Meetings
- Notes
- Phone Calls
- Emails
- Roadshows
- Itinerary Builder
- Calendar
- Deal Pipeline Management
- Corporate Participants
- Report Builder

## Ownership

Premium Ownership  
(Factset 13F, D, G Filings, Current and Historical)  
AI Targeting  
Contact-Level Targeting  
Buy & Sell-Side In-Depth Profiles:

- Firm
- Fund
- Contact
- Surveillance Analyst Data Integration

Ownership Activity Charts

- Peer Comparison
- View Ownership vs. Share Price, Events Activity

## Q4 Support Features

Q4 Team  
Release Notes  
In-App Tutorials

## Report Builder

Data Aggregation  
Visualization  
Board Report  
Export to PowerPoint and Excel

## Trading Analytics

Volatility  
Expected Trading Range  
Sentiment  
Relative Performance

## Research & Estimates

Earnings Estimates (Factset)  
Consensus on Multiple Fundamentals  
Detailed Estimates  
Broker Details

## Transcripts & Events

Institutional Quality Transcripts  
(Factset - CallStreet)  
Earnings Events  
Sell-Side Conferences  
Corporate Events  
Event Calendar

## Briefing-Books

Printer Friendly Profiles  
Historical Activity  
Cover Pages

## Q4 Hosted Webcast Analytics

Webcast Attendance Stats  
Webcast Attendees  
Linked Profiles

## ABOUT Q4 INC.

Q4 is a leading global provider of cloud-based investor relations, with the mission of partnering with customers to achieve their strategic IR objectives. With best-in-class customer experience and an innovative suite of IR technology, Q4 is a trusted partner to over 2,200 of the world's largest brands. Our comprehensive portfolio of IR communications and intelligence solutions, supported by an industry-leading customer experience model, we empower our customers to build impactful and strategic IR programs. Q4 has offices in New York, Toronto, London, and Copenhagen. To learn more, visit: [www.q4inc.com](http://www.q4inc.com).

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