



Interactions

Web-based tool to manage past interactions with your research counterparties. Ability to manage your future interactions coming soon!

KEY STATS

1000+

providers sending meeting data

21

meeting types captured

10

years activity maintained on system

CUSTOMERS

Asset managers

Hedge funds

Broker/dealers

Research providers

Investment banks

IHS Markit provides an aggregated view of sellside interactions that you have attended and/or wish to attend in the future on a granular level. This data can support assessments of the quality of service from each provider.

Evolving global regulations have led to the heightened focus on how commission dollars are allocated. Investment professionals need to understand which services are being delivered to them by their counterparties in order to determine how to compensate for those services appropriately.

The evaluation of counterparties enables firms to assess the value of services and determine how commissions will be allocated. IHS Markit enables investment professionals to maintain a historical record of their meetings with research providers, to help support assessments of their relationships.

Event data is aggregated from sellside brokers to provide a single, clean data source for interaction details. Interaction information captured includes meeting type, description, sector, industry, company, ticker, speakers, attendees, time and location.

Holistic event management system

Consolidated view for managing past and future events across all counterparties.

Integrated with the Evaluation platform

Review attended meetings within our Evaluation tool to help aid counterparty evaluations.

Administrative tool

Enables users to manage, review and edit meeting details.

Global support

Dedicated relationship manager provides streamlined onboarding and ongoing support around the clock.

Meeting details

Access to details such as description, sector, industry, company, ticker, speakers, sales credit, attendees, time, and location.

Event rating

Ability to rate, comment and/or place a value on the interaction.

View meetings by broker/vendor

← Back to Attended Meetings

Vendor Actions ▾

Submitted | In Review | Published

369 Events Meeting Type: All Types Date Range: Start Date: TG End Date: Search...

Meeting Name	Vendor Name	Meeting Type	Meeting ID	Tickers	Buy-side Attendees	Start
Meeting 1	Vendor 1	Conference	123	MRKT	1	16-Jul-2014
Meeting 2	Vendor 2	Bespoke Research	456	MRKT	3	16-Jul-2014
Meeting 3	Vendor 3	Analyst Meeting 1:1	789	MRKT	1	14-Jul-2014

View meeting details

Details

DATE 07/14/2014 PROVIDER Sellside Demo

Event URL
Event URL Description

Meeting Type	MEETING DETAILS Analyst Meeting 1:1	BUYSIDE ATTENDEES John Smith
Description	Meeting with lead research technology analyst	
Unique ID	789	SELLSIDE ATTENDEES Jane Doe
Associated ID	1	
Sector	SUBJECT Financial Technology	THIRD-PARTY ATTENDEES Michael Jones
Industry	Technology	
Company(s)	Markit	
Symbols(s)	MRKT	
Start Date	TIME AND LOCATION 07/14/2014	
End Date	07/14/2014	
Sales Credit	Jane Doe	
Location	New York, NY	

Integrated with our Evaluation service

Q1 2014 Ballot Progress

Final Ballot Submitted by Apr 30, 2014

Points Allocated (of total) 54 of 100

Candidates Voted (of total) 8 of 16

Top Firms by Percent Voted

Firm Name	Q1 2014
Firm 1	10 (19%)
Firm 2	9 (17%)
Firm 3	9 (17%)
Firm 4	7 (13%)

John Smith - My Meetings

Candidates	Current	Previous	Comments
Sellside 1	9	5	Small cap conference in April was helpful. Need more research on stocks under \$1B.
Sales Coverage	3	3	
Trade Ideas	2	1	
Research Ideas	3	1	
Availability & Responsiveness	1	0	
Execution Quality	0	0	
Mike Smith			Recognized for service
Sellside 2	7	3	Need more corporate access in Hong Kong office.
Sales Coverage	2	3	
Trade Ideas	0	0	
Research Ideas	2	0	
Availability & Responsiveness	2	0	
Execution Quality	1	0	

A Retrieve your meeting details as you evaluate your brokers.

More information on IHS Markit products and services

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