

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



Interactions

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

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.

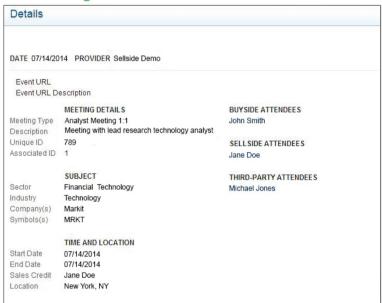
Event rating

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

View meetings by broker/vendor



View meeting details



Integrated with our Evaluation service



Retrieve your meeting details as you evaluate your brokers.

More information on IHS Markit products and services

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