

## Research

A host of research resources are available through Raymond James, covering macro-economic and strategic views as well as equity research and fund selection tools.

### Fund Selection and Market Data Tools

As part of our research solution, wealth managers working with Raymond James have access to fund analytics tools and a number of market data tools, available at a discounted rate.

For collectives, including ETFs, funds and investment trusts, we offer discounted access to Morningstar Adviser Workstation™. You can also subscribe to a data feed of client holdings via Morningstar's system to enable you to view portfolios and run reports from the Adviser Workstation. We can also provide discounted access to FE Analytics.

### Client Approved Market Commentary and Investment Strategy

Pre-approved market commentary written by our in-house economists and strategists is made available on a regular basis. These communication tools can be used to engage with clients, post content to your website and share via social media.

In addition, wealth managers have access to Raymond James' European Strategist Team via a weekly conference call and quarterly interactive webinar sessions for an opportunity to challenge the content, ask questions, and feed what you learn into your investment committee decisions.

### Our MiFID II Compliant Research Solution: Red Deer\*

With the implementation of MiFID II in January 2018 bringing about significant changes to the way research is accessed, Raymond James has partnered with a third party research aggregator to help your business stay compliant and continue to benefit from access to an array of research.

Access to research through our third party research aggregation platform, Red Deer, includes direct equity research from ten research houses, covering UK, European, US and Asian Equities, Investment Trusts, Fixed Interest and Strategies.

#### You will have access to:

- ▶ **Raymond James' award winning Equity research** written by Raymond James analysts, covering 1,000+ companies across 9 sectors
  - ▶ **Global Equity, Economic and Strategy research** written by other top tier, third party investment banks as well as niche providers
  - ▶ **Raymond James Economic and Strategy research** from our Chief Investment Officer, Chief Economist and European Strategy Team
  - ▶ **Daily morning research notes** plus ideas and Gilt yield sheets from various agents
  - ▶ **ESG and SRI Research** through access to Ethical Screening a filterable database with access to over 180 ESG and SRI Funds as well as over 700 global direct equities. The website includes questionnaires to help establish a client's Ethical preferences for Funds and individual global companies and allows you to build and monitor ESG and SRI models as well as providing regular updates on relevant market news in the sector.
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## Red Deer - what's included?

Raymond James is committed to providing the wealth managers who work with us a comprehensive research solution, so that you can continue to provide your clients with a superior level of service. Since implementation in early 2018 we have secured agreements with a number of research providers.

At present they include:

Barclays  
Charles Stanley  
Edison  
FinnCap  
HSBC

Investec  
J.P. Morgan Cazenove  
Liberum  
Numis  
Peel Hunt

Progressive Research  
Raymond James  
Singer N+1  
Stifel  
Zeus Capital

Red Deer allows you to search across all of the notes published by the Research Houses with whom we have agreements. Specific filters allow you to create bespoke lists whether it is by key word, research house, time period or investment types and geographies so that you get what you need when it is published, to support your investment strategy.

To give an indication of the Red Deer capability, from January to December 2020 Red Deer provided access to:

### UK Coverage

- Over 25,200 pieces of research mapped to over 1,000 securities from 10 brokers
- Over 15,200 equity company reports
- Over 5,100 equity industry reviews
- UK Large cap (>2bn mkt cap)
- Over 14,200 pieces of research mapped to over 250 companies from 10 brokers
- Over 6,300 equity company reports
- Over 4,600 equity industry reviews

### UK Mid cap (1-2bn mkt cap)

- Over 5,100 pieces of research mapped to over 100 companies from 10 brokers
- Over 2,400 equity company reports
- Over 700 equity industry reviews

### UK Small cap (<1bn mkt cap)

- Over 11,600 pieces of research mapped to over 700 companies from 10 brokers
- Over 7,200 equity company reports
- Over 1,100 equity industry reviews

### Investment Trusts

- Over 1,900 pieces of research mapped to over 175 UK alternative investments, UK closed end mutual funds, UK open end mutual funds from 9 brokers

### European (excluding UK)

- Over 12,700 pieces of research mapped to over 700 securities from 10 brokers
- Over 4,300 equity company reports
- Over 6,000 equity industry reviews

### US coverage

- Over 39,800 pieces of research mapped to over 1,700 securities from 10 brokers:
- Over 21,600 equity company reports
- Over 14,400 equity Industry reviews



I am hugely impressed and exceedingly happy with the MiFID II compliant research solution Raymond James has crafted. Outstanding job!

Mark Beaney – Chartered Wealth Manager and Branch Principal

Get in touch with one of our Business Development Consultants



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