RAYMOND JAMES

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.

What's included?

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 180+ ESG and SRI funds and 700+ global direct equities. Plus, questionnaires to help establish a client's ethical preferences for funds and individual global companies, the ability to build and monitor ESG and SRI models, and regular updates on relevant market news in the sector

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.

We also provide our branches with access to AssetQ, to assist with evidencing how the Consumer Duty price and value outcomes are met. The system provides information that product manufacturers must make available to distributors on the fair value of their collective investments, enables the fund assessments and offers timely notification of important changes in relation to collective investment holdings. AssetQ also serves as a useful resource in assisting with investment oversight and on-going performance of the collective investments.

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.

Charles Stanley research

We provide complete access to Charles Stanley's research, which includes direct equities and comprehensive collective research, covering ETFs and investment trusts as well as funds. The Collective Research team provides a Preferred List which has the research to back up the constituents and access to competitive share classes.

Morning meetings

The Charles Stanley Research team host a morning meeting twice a week covering geopolitical events, economic news, company results and general market thoughts together with reviews of recent research notes.

Multi-asset guidance portfolio

Charles Stanley's Research has a series of four guidance portfolios which are details on the intranet site, including the Guidance Presentation which talks about the investment philosophy and structure.

Our MiFID II compliant research solution: Red Deer/Kaizen*

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/Kaizen, includes direct equity research from ten research houses, covering UK, European, US and Asian equities, investment trusts, fixed interest and strategies.

Red Deer/Kaizen - what's included?

Red Deer/Kaizen allows you to search across all of the notes published by the research houses we have agreements with. 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. Since implementation in early 2018 we have secured agreements with a number of research providers.

Barclay	**Investec**	**Numis**	**Singer Capital Markets**
Charles Stanley	**J.P. Morgan**	**Peel Hunt**	**Stifel**
Edison	**Liberum**	**Raymond James**	**Zeus Capital**
HSBC			

UK Coverage

- Over 32,700 pieces of equity research
- Over 20,800 equity company reports
- Over 10,400 equity industry reviews

UK Large Cap (>2bn mkt cap)

- Over 26,700 pieces of equity research
- Over 15,400 equity company reports
- Over 9,800 equity industry reviews

UK Mid cap (1-2bn mkt cap)

- Over 10,900 pieces of equity research
- Over 6,400 equity company reports
- Over 3,100 equity industry reviews

UK Small cap (<1bn mkt cap)

- Over 15,100 pieces of equity research
- Over 9,200 equity company reports
- Over 4,500 equity industry reviews

European (excluding UK)

- Over 21,600 pieces of equity research
- Over 10,300 equity company reports
- Over 11,000 equity industry reviews

US coverage

- Over 26,000 pieces of equity research
- Over 15,900 equity company reports
- Over 9,800 equity industry reviews

Investment Trusts

- Over 1,900 pieces of research

> "I am hugely impressed and exceedingly happy with the MiFID II compliant research solution Raymond James has crafted.
>
> Mark Beaney – Chartered Wealth Manager and Branch Principal

Get in touch with one of our Business Development Consultants

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