

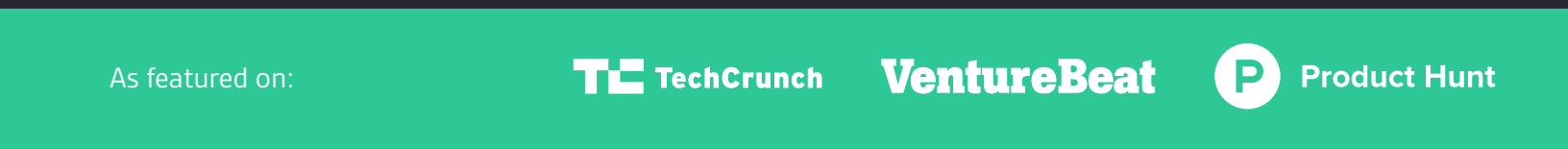
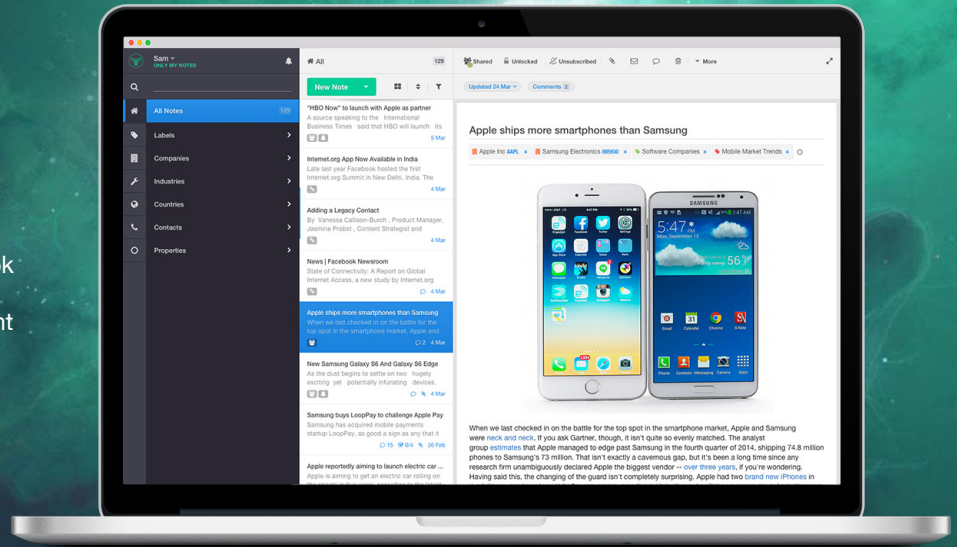


bipsync

Research Automation Platform

A central research database, a digital notebook and idea pipeline - connected, compliant and beautifully integrated to drive better investment decisions, faster.

Sign up for a free account
www.bipsync.com



Designed for Adoption, built to Compliant Standards

✓ Research Management

Centralize research assets in a structured knowledge base. Our version integrates a CRM.

✓ Modern Connectivity

Mobile apps with offline sync, programmatic access via APIs, and 3rd party integrations.

✓ SEC Record-keeping

Meets Rule 204-2 standards on record preservation, accessibility and retention.

✓ Digital Notebook

Capture information, collaborate with colleagues and stay on top of developments that matter.

✓ Design Focus

A clean, pixel-perfect interface to minimize learning curve and drive voluntary usage.

✓ Seamless Deployment

Vendor qualification, migration assistance, on-site on-boarding, process advising and more.

✓ Pipeline Management

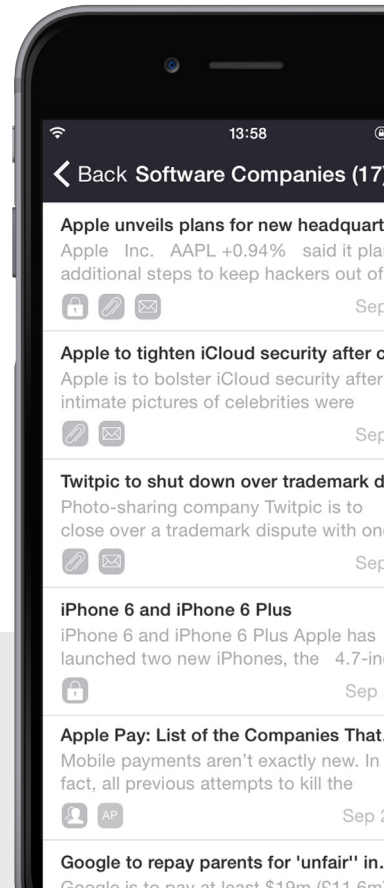
Build a systematic research process: stages, progress rules, idea scoring and funnel analytics.

✓ Integrated Solution

A natively integrated platform for more power, less hassle and comprehensive service.

✓ Compliance & ODD

Best practices in vendor data management and security to support compliance and ODD.

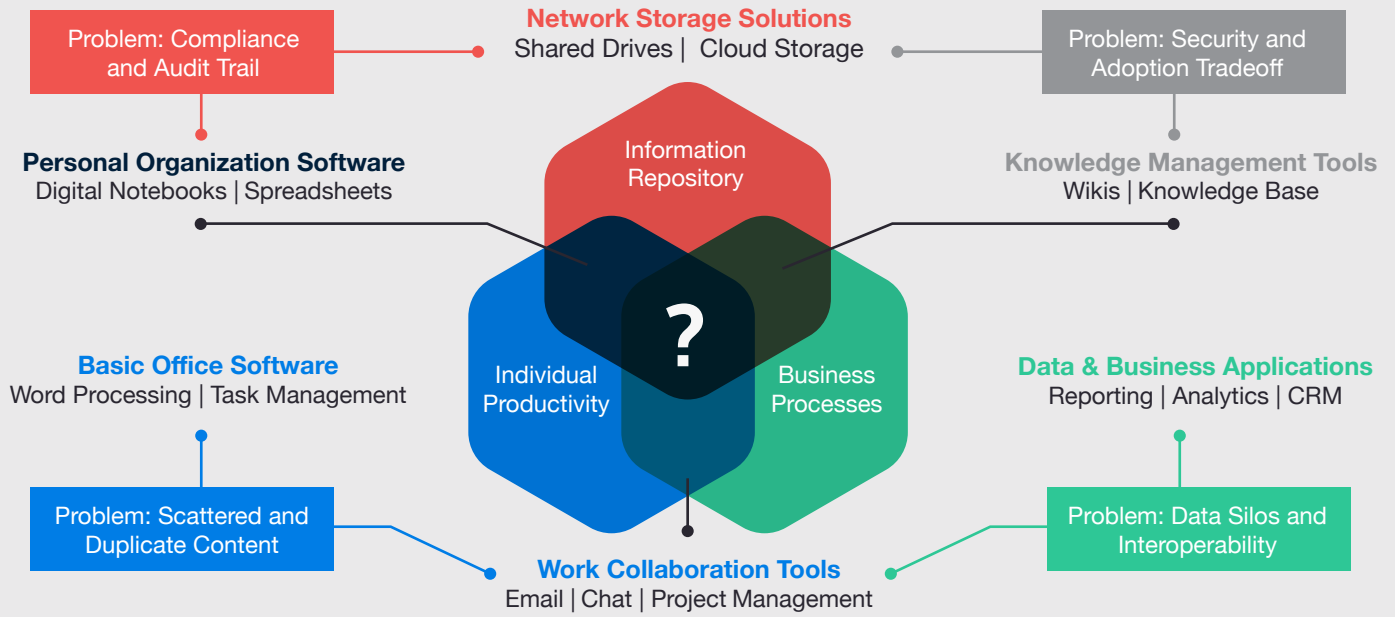


“ Our analysts are clamoring for this sort of functionality ”

CTO, \$6bn Hedge Fund



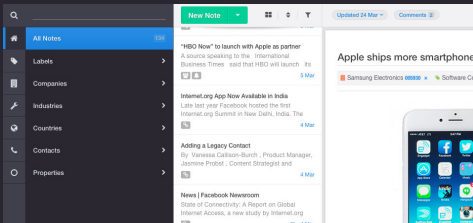
Modern Investors Demand More than Patchwork IT or Consumer Software Hacks



The Solution: An Integrated Research Environment for Modern Investors

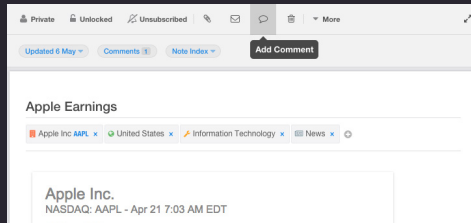
Research Automation integrates three critical components: a research database, a productivity environment and a work-flow engine. Integration facilitates data capture, reduces app switching and links disjointed work-flows - enabling better, faster and more consistent investment decisions.

Central Research Database (RMS)



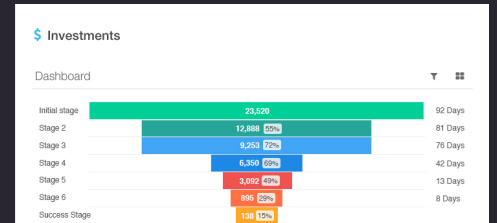
A single source of truth for all research assets - data, files, notes, contacts - enriched, organized and mapped across multiple dimensions.

Digital Investor Notebook



Intuitive tools for aggregating research across channels, authoring content, collaborating and automating routine tasks.

Idea Pipeline



Define, track and measure stages, progress and output along the research process with auto-logging, reports and visualizations.

Bipsync vs. Existing Research Management Solutions

	code:red Traditional RMS	Custom IT	Hacks	Bipsync
Estimated per user pricing	\$400-\$1000 / mo	\$1M-\$2M+ / fund	Freemium \$50+ / mo	\$100-\$600 / mo
All-in-One RMS, CRM, Notebook, Analytics	-	-	-	✓
Connectivity to 3rd Party Apps such as Evernote	-	-	✓	✓
Modern API and Customizable Architecture	-	-	✓	✓
Core Competencies in Usability and Design	-	-	✓	✓
Accessible to Range of Customers Across Price Points	-	-	✓	✓
5-Minute Deployment, Instant System and Feature Updates	-	-	✓	✓
SEC Rule 204-2 Compliant Record-keeping	✓	✓	-	✓
ODD-tested Data Management and Security	✓	✓	-	✓
Functionality Purpose-Built for Investors	✓	✓	-	✓

“ It’s the tool I wish I had as an analyst ”

Danny Donado,
Bipsync Founder & CEO

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RMS: Centralize and organize your research, automatically

- **Research Management:** consolidate all research assets (notes, files, contacts) across the firm into collective knowledge.
- **Investor CRM:** automatically capture interactions with your contacts and attribute insights and assets to research sources.
- **Email Integration:** capture email via forwarding or with the Outlook plug-in – relevant contacts and companies are auto-tagged.
- **3rd Party Integrations:** import your content from Evernote with more on the way.
- **Multi-Dimensional Organization:** slice and dice by user labels, fund-level categories or global entities (companies, industries etc.)
- **Data Enrichment:** Bipsync auto-associates notes to companies and auto-tags contextual data, such as date and location.

Digital Notebook: Accelerate your productivity, seamlessly

- **Integrated Environment:** compile, process and distribute research and insights under a unified, clean and consistent interface.
- **Mobile:** native mobile apps with offline sync allows users to access their research without a data connection while on the road.
- **Collaboration:** share research, lock note editing, leave in-line note comments or discuss generally in threads.
- **Subscriptions and Alerts:** be notified when research is created/modified for any note, company, industry, label or field.
- **Task Automation:** notes are auto-saved, web sources are auto-attributed, and a revertible history is auto-generated for each note.
- **Templates and Snippets:** accelerate note-taking with pre-formatted note shells and reusable blocks of formatting.

Pipelines: Convert ideas into investments, systematically

- **Pipeline Management:** model your idea funnel to coordinate team efforts, normalize output and drive objective idea assessment.
- **Idea Tracking:** capture the time-line of research efforts, activities and events as ideas progress through your pipeline.
- **Process Control:** use activity check-lists, required deliverables, and approval rules to standardize research processes.
- **Visualizations and Analytics:** surface insights to improve the quality and efficiency of research efforts driving investment decisions.

Compliance & IT: Demonstrate best practices and control deployment, painlessly

- **Audit Trail:** time-line of activities, content and communication related to investment decisions is auto-logged.
- **Electronic Record-keeping:** built to SEC Rule 204-2 standards on record retention, preservation and accessibility.
- **IT Compliance:** Operational Due Diligence (ODD) tested to demonstrate best practices on data capture, data management and business continuity.
- **Compliance Reporting:** dramatically simplifies audit requests by extracting a time-accurate archive of queried content in seconds.
- **Customize Everything:** define objects and fields, configure sharing/access control, connect your own data and more.
- **Programmatic Access via APIs:** extract/insert content at will and integrate your data to any dashboard.