

Symphony Analytics Panel for Eidos v2.5.1

User Guide

December 2024

Table of Contents

Introduction	1
Research Quality	2
Thematic tagging	6
ESG tagging	7
Company tagging	10
Entity tagging	12

Introduction

As part of the Eidos platform, the Symphony Analytics panel provides writers with many tagging capabilities and options to improve their research reports and allows them to evaluate their writing performance efficiently.

Two type of panels are available:

- Research Quality panel
- Tagging panel - includes the following modules:
 - Thematic Tagging
 - ESG Tagging
 - Companies Tagging
 - Entities Tagging

Research Quality

Reveal quantifiable insights by providing writing performance metrics that enable you to improve your reports and allow your managers to evaluate writing performance at scale efficiently.

Feature overview

Natural Language Processing - Amenity Web Plugin

Quality Check

✓ Thesis Identified

✓ Price Target & Estimates

Overused

3

Words

Hedging

52

Sentences

Complicated

0

Sentences

Passive Voice

60

Sentences

Forward Looking

79

Statements

Exaggerated

7

Language

Price Targets & Estimates

1

& Estimates

Mgmt Criticism

0

Sentences

Mentions [Clear mentions highlight](#)

"Among the first high profile departures, as we noted..."

"new capacity and will create an..."

"public attention, pricing pressure from the Black Friday..."

"with stakeholders potentially holding top mgmt responsible, and potential financial"

"actions could help to remedy a bit."

"However, the challenge of what may be a"

"...of harassment; meanwhile investors could also try to"

"...male employee) and the generally "male-dominated, sexualized and libidinous"

"the financial and reputational damage is short term and limited."

"...the HR role will certainly be challenging - a..."

"...HR role will certainly be challenging - a convincing appointment..."

Forward looking vs Historical statements

49% 51%

Forward looking Historical

Time frame specificity of forward looking events

100% 0%

Specific timeframe Non-Specific timeframe

Reference proximity to Exhibits

N/A N/A

Sentence complexity

N/A N/A

Exhibits Presented	0	Average Sentence Word Count	10
Exhibits Referenced	1	Max Sentence Word Count	25
Referenced Close To Exhibits	0	Total Sentences	623
Referenced Far From Exhibits	0	Total Complex Sentences	0
		Word Count	6,533

Last analyzed: 6/17/24, 15:29:54

Analyze Report

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Table: Quality Check tab

Feature	Description
Thesis Identified	The main argument or central idea of the article has been clearly recognized.
Price Target & Estimates	Well-defined financial projections and valuation estimates have been included in the article.
Overused words	Highlights jargon and overused words.
Hedging	Identifies instances of hedging language so that the editor can write a definitive, actionable statement rather than meandering vague claims.
Complicated sentences	Highlights overly complicated and run-on sentences.
Passive voice	Highlights the use of passive voice so that the author or editor can quickly identify and reduce these instances.
Forward-looking	Highlights sentences that provide a forward-looking perspective rather than a historical perspective.
Exaggerated	Highlights sentences with exaggerated words – extremely, laudable, substantially impact, considerably.
Price targets & Estimates	Extract any mention of a price target in the text to maintain consistency.
Management criticism	Highlights sentences that can refer to management criticism to avoid political consequences.
Forward-looking vs. Historical statements	Graphical representation of how forward-looking is analyzed in the text.
Time frame specificity of forward-looking events	Shows the balance between time-specific and vague, forward-looking statements.
Reference proximity to Exhibits	Ensures all exhibits are properly referenced briefly.
Sentence complexity	A visual check of whether the report contains long sentences and how that count compares to the rest of the text.
Exhibits Presented	Counts how many exhibits are in the report.
Exhibits Referenced	Counts how many references for exhibits there are in the report.
Referenced Close to Exhibits Referenced Far from Exhibits	Counts instances where references are close/far from the exhibits themselves.

Using research quality

1. Write your report.
2. Select the **Analyze Report** button to reveal all the available insights.

The number on each circle refers to the number of related mentions in the text.

3. Select each circle to see all the mentions that are related to it, then select each sentence to highlight it in the actual report.

<p>Overused</p> <p>25</p> <p>Words</p>	<p>Hedging</p> <p>54</p> <p>Sentences</p>	<p>Complicated</p> <p>24</p> <p>Sentences</p>	<p>Passive Voice</p> <p>64</p> <p>Sentences</p>
<p>Forward Looking</p> <p>47</p> <p>Statements</p>	<p>Exaggerated</p> <p>9</p> <p>Language</p>	<p>Price Targets</p> <p>5</p> <p>& Estimates</p>	<p>Mgmt Criticism</p> <p>2</p> <p>Sentences</p>

Mentions

"...to a Hold and **cut our PT to EUR74** (EUR89) based on 25x..."

"**price target**, and hence move to Hold from Buy."

"...The investment rating and **price target** have been temporarily suspended."

"...are based on several methodologi**price targets** include, but are"

"Risks which may impede the achievement of our **Price Target**"

[Clear mentions highlight](#)

Price Target Discrepancy

Accurately targets price discrepancy from the metadata in the published documents.

Logic:

- If there are no discrepancies, the price target icon appears in green.
- If there are price discrepancies, the icon is red.
- A tooltip appears when you hover over the extraction, displaying the company ticker and correct price target from the metadata when there is a discrepancy.

The screenshot displays a dashboard with several metrics and a list of mentions. The metrics are as follows:

Price Targets 4 Estimates	Mgmt Criticism 0 Sentences	Exaggerated 56 Language	Forward Looking 113 Statements
Hedging 111 Sentences	Complicated 377 Sentences	Overused 34 Words	Passive Voice 128 Sentences

Mentions

- "...Inc. (AAPL, OW \$42.53 , **PT \$15.00**) (Vivek Juneja) BSA/AML Investigation..."
- "...Inc. (AAPL, OW \$42.53 , **PT \$15.50**) (Vivek Juneja) BSA/AML Investigation..."
- "...Inc. (AAPL, OW \$42.53 , **PT \$20**) (Vivek Juneja) BSA/AML Investigation..."
- "...Inc. (AAPL, OW \$42.53 , **PT \$21**) (Vivek Juneja) BSA/AML Investigation..."

A tooltip is shown over the first mention, displaying:

- Company name: **Apple, Inc.**
- Price Target From Metadata: \$15**

Thematic tagging

Identify themes in any report and apply the identified themes as tags to the document without leaving Eidos' environment or even the authoring screen.

We support a variety of themes, such as:

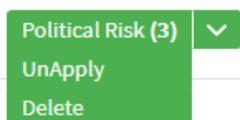
- Artificial intelligence
- Carbon transition
- Consumer Finance
- Economic growth
- Interest rates
- Leverage
- Mergers and acquisitions
- Political risk
- Tax
- Unemployment
- Growth (Corporate)
- Market Position

Using thematic tagging

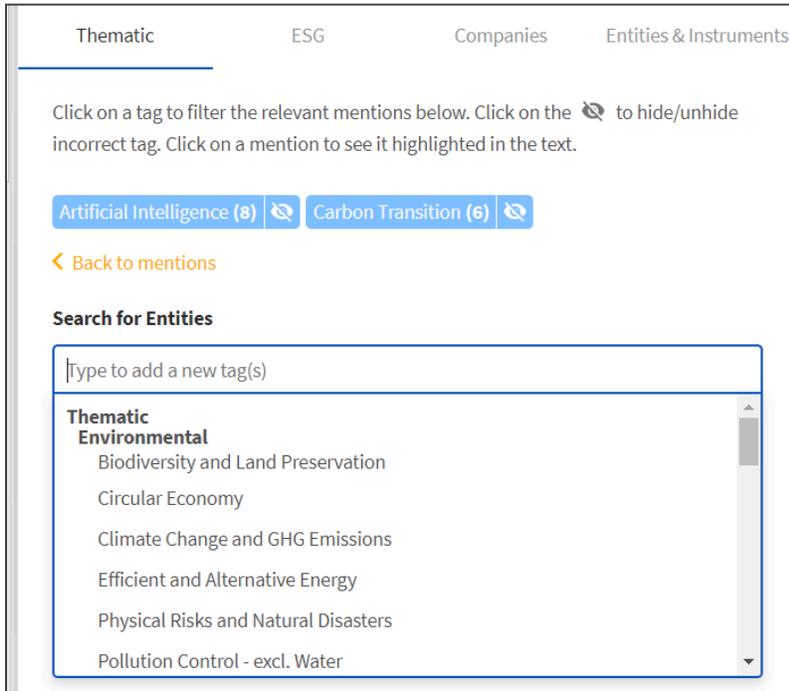
1. Write your report.
2. Select the **Analyze Report** button to identify the most important themes in your published report. Each tag of an identified theme contains the number of related mentions in the text.
3. In tabs with mentions, click on a tag by which you want to filter the mentions.
4. Select each sentence to highlight it in the actual report.
5. After reviewing all the identified themes, you can:
 - a. Click the **X** button to hide a tag. The hidden tags panel is located at the bottom of the tab view; you can unhide any hidden tags.



- b. Select the **Apply Tags** button at the bottom of the panel to apply all visible tags to the document.
- c. Use the **UnApply** or **Delete** button to remove a tag if needed.



d. To add manual tags, click the **Add Tag +** button and select from the opened list:

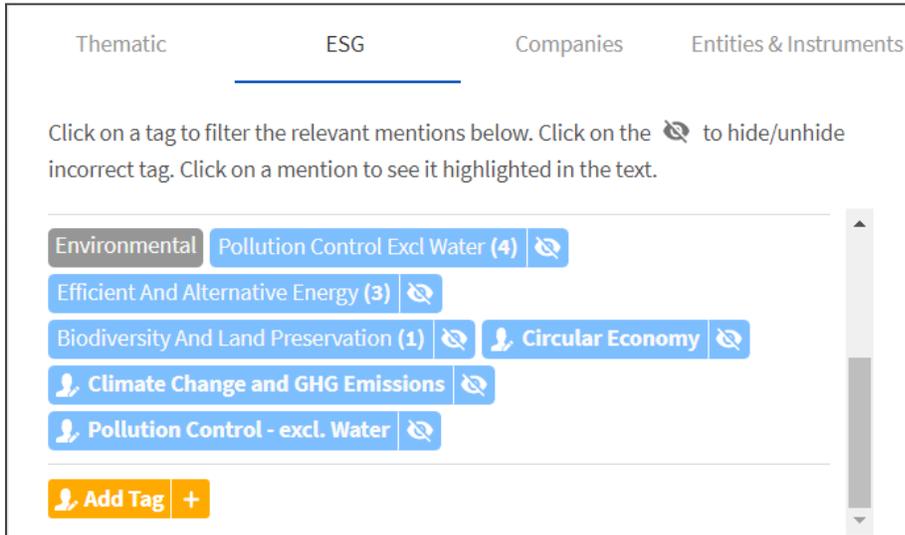


ESG tagging

Identify ESG topics in any report and apply the identified ESG topics as tags to the report without leaving Eidos' environment, or even the authoring screen.

We support a variety of themes, such as:

- Harassment and assault
- Human capital
- ESG commentary
- Ethics and anti-corruption
- Transparency and disclosure
- Climate risk
- Cyber risk
- Shareholder engagement
- Access and affordability
- Governance commentary
- Product quality
- Environmental commentary
- Workplace safety
- ESG mention
- Legal regulatory
- Environmental regulation
- Supply chain
- Pollution management



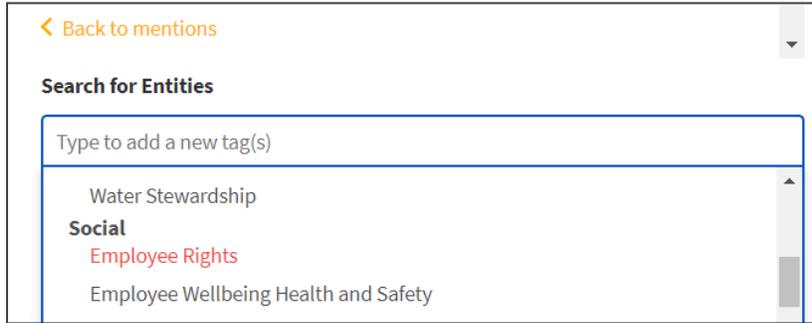
ESG Materiality

The **ESG Materiality** section indicates whether the document is considered a match for ESG Materiality, with a confidence level indication. The confidence level is presented as a percentage numerical value. The confidence value is calculated by dividing the number of sentences with ESG tags by the number of total sentences and then multiplied by a confidence interval.

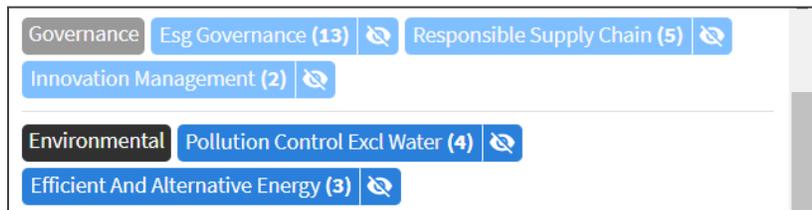


Using ESG tagging

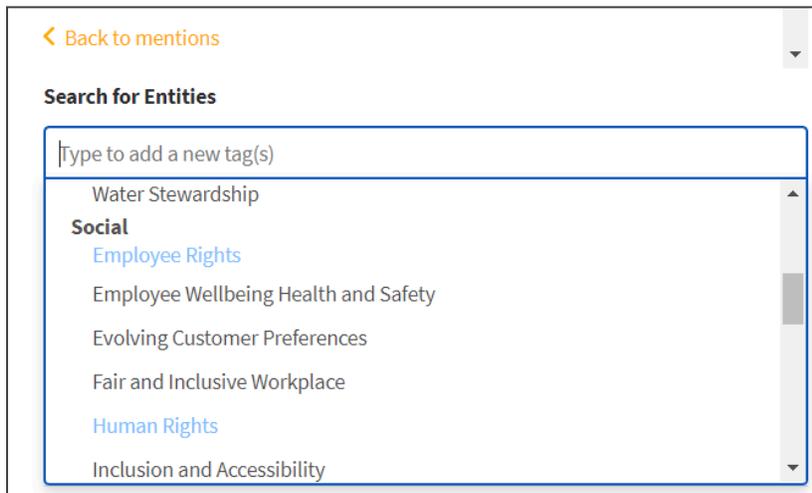
1. Write your report.
2. Select the **Analyze Report** button to identify the most important themes in your published report. Each tag of an identified ESG topic contains the number of related mentions in the text.
3. Select each sentence to highlight it in the actual report.
4. After reviewing all the identified ESG topics, you can:
 - a. Click the eye button  to hide a tag.
 - The hidden tags panel is located at the bottom of the tab view.
 - You can unhide any hidden tags.
 - Hidden tags appear in red in the **Add Tags** dropdown.



- b. Click on the Environmental, Social, or Governance Primary Tag to select or deselect the secondary tags. When not selected, the tags appear in a lighter shade and do not appear in the **Mentions** toolbar.



- c. Click the orange **Add Tag +** button to add tags. This will open a dropdown list of available tags. The ones appearing in blue already exist and are unavailable to add.



- d. When a tag is added, it will appear in the panel with a different icon than the auto-generated tags.
 - The author and pen icon denotes that a tag was added manually.

- In this example, the Human Rights tag was added manually and has the author icon to its left:



- Select the **Apply Tags** button at the bottom of the panel to apply all visible tags to the document.



Note: Applied tags will be saved to the report’s metadata and loaded into the panel every time the report is loaded.

- You can use the **UnApply** button to remove a tag if needed.

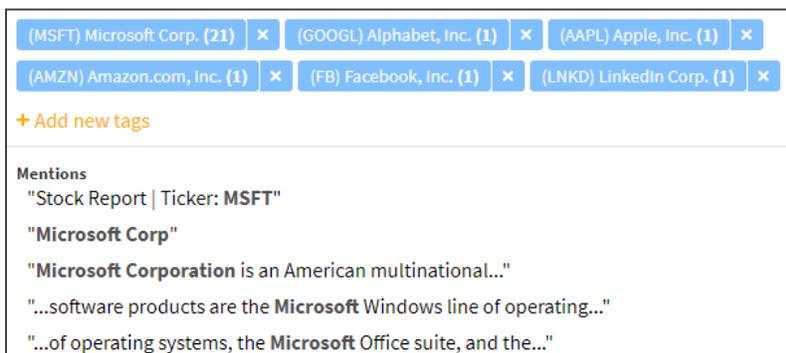


Company tagging

Identify all the companies mentioned in a report and apply the identified companies as tags to your report.

Detect over 24,000 public and private companies in the US and internationally:

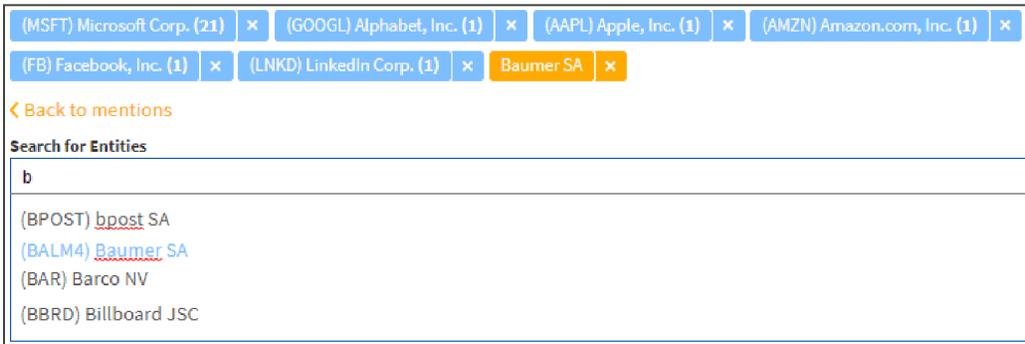
- All major US equities, including Russell 3000 and S&P 500.
- Over 7,000 international equities.
- Over 16,000 private companies, and expanding.



Using company tagging

1. Write your report.
2. Select the **Analyze Report** button to identify the most important themes in your published report. Each tag of an identified company contains the number of related mentions in the text.
3. Select each sentence to highlight it in the actual report.
4. After reviewing all the identified companies, you can:
 - a. Click the **X** button to hide a tag. The hidden tags panel is located at the bottom of the tab view; you can unhide any hidden tags.
 - b. Select the **Apply Tags** button at the bottom of the panel to apply all visible tags to the document.

Note: Applied tags will be saved to the report’s metadata and loaded into the panel every time the report is loaded.
 - c. Use the **UnApply** button to remove a tag if needed.
5. To add additional companies, select **Add new tag** and start typing their names in the **Search for Entities** field.



Entity tagging

Identify all the entities mentioned in a report and apply the identified entities as tags to your report.

Feature overview

Entities & Instruments

Below are the Entities & Instruments we tagged in this report. If the tagging is incorrect, click on the 'x' icon to hide it.

[Collapse All](#) ^

Sector/Industry [1] ^

Refining & Marketing (4) v

Geography [3] ^

USA (1) v Canada (1) v California (1) v

Commodity [2] ^

gasoline (9) v diesel (1) v

Equity [3] ^

Barrels (1) v RHS (1) v Note (1) v

Last analyzed: 7/3/24, 16:24:01

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[Apply Tags](#) [Analyze Report](#)

Available entity types

Geography, Sector/Industry, FX, Commodity, Central Bank, Equity, Managed Product, Mutual Fund, Index, ETF, Alternative, Curated List

Using entity tagging

1. Write your report.
2. Select the **Analyze Report** button to identify all types of entities in your published report. Each tag of an identified entity contains the number of related mentions in the text.
3. After reviewing all the identified entities, you can:

- a. Click the **X** button to hide a tag. The hidden tags panel is located at the bottom of the tab view; you can unhide any hidden tags.
- b. Select the **Apply Tags** button at the bottom of the panel to apply all visible tags to the document.

Note: Applied tags will be saved to the report’s metadata and loaded into the panel every time the report is loaded.

- c. Use the **UnApply** button to remove a tag if needed.

Every module in the **Tagging** panel uses color-coded tags, where each color indicates a different source and status:

Source/Status	Regular	Selected/Filtered	Applied	Applied & selected
Model identified				
Manually added & loaded from metadata				
Hidden				

Note: Applied tags loaded from the document’s metadata will appear the same as manually applied tags (dark gray).