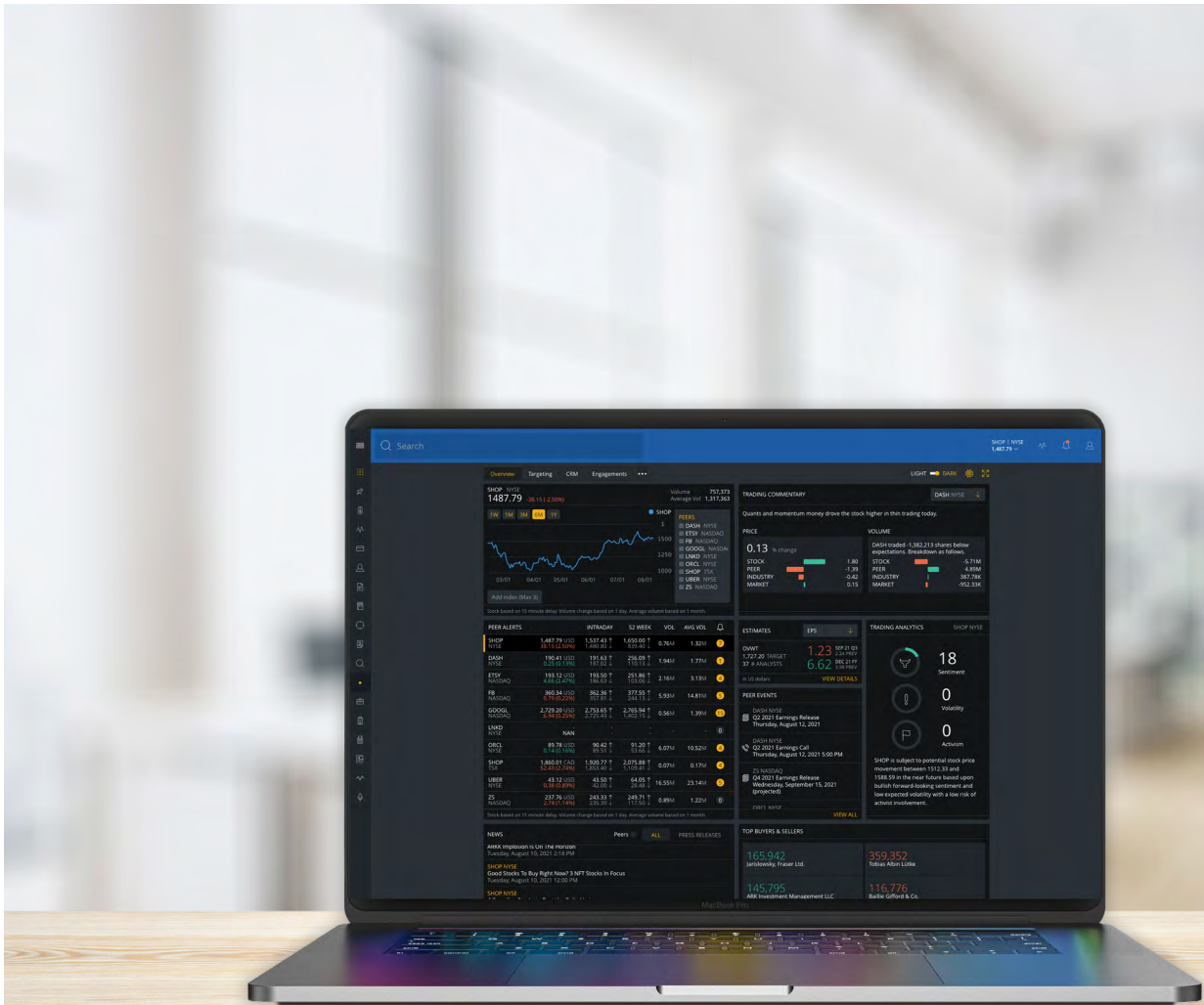


# Q4 Desktop



Investor relationship management simplified.



With changing investor preferences, new regulatory hurdles and the seismic shift to virtual, the way in which the capital markets engage with public companies has been forever disrupted. Investor Relations Officers have adapted, becoming increasingly proactive in communicating their unique value to shareholders.

At Q4, we understand that to build a proactive and impactful program, IR professionals need innovative tools that streamline the collection and synthesis of each and every interaction with the capital markets, transforming data on investor behavior into actionable next steps.

## What is Q4 Desktop?

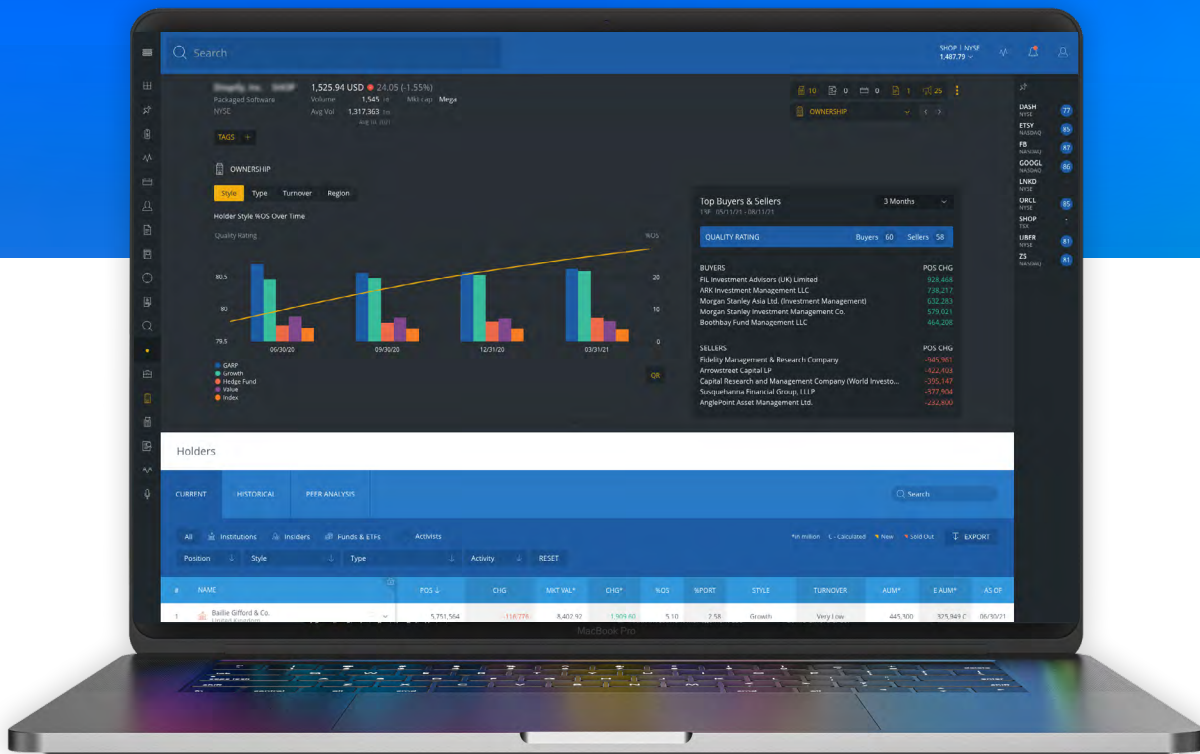
Q4 Desktop was purpose built for the modern IR team, emphasizing simplicity and comprehensiveness. A streamlined experience enables public companies to elevate their daily workflow by connecting investor engagement tracking, targeting, and behavioral analytics across one's website, events and IR content consumption in an intuitive platform.

Using a singular platform, public companies can reinvent how they target new investors, monitor market movements, assess the performance of their IR program vs peers and get ahead of activists with Engagement Analytics.



# Transform data into actionable insights.

IR programs continue to grow in complexity amidst the array of proactive activities needed to position a compelling investment opportunity. Across non-deal roadshows, earnings calls, conferences, IR websites, and countless other activities, investors are generating data, signaling their intent to invest. With Q4 Desktop, you have the only platform to collect and consolidate data from all engagements revealing contextualized, and actionable insights to drive an outperforming proactive IR strategy.

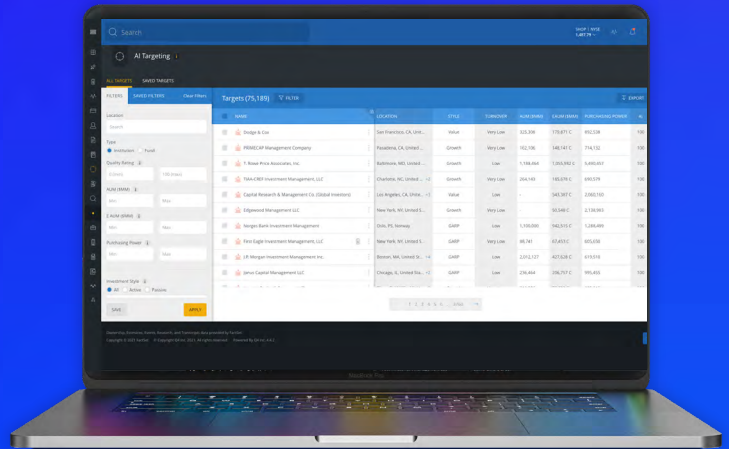


**Q4 Desktop brings together all IR analytics for a 360 degree view of investor behavior including:**

- ✓ Ownership Updates & Shareholder ID Changes
- ✓ Peer, Sector and Market Trends
- ✓ Meetings & Activities
- ✓ Investor Engagement Benchmarking
- ✓ Conferences and NDR Engagements
- ✓ Website Visits & Downloads
- ✓ Event Registration & Attendance
- ✓ Peer and Market Cap Content Benchmarking



# Connect and prioritize the right engagements.



## Target the right investor

Aggregate behavioral analytics across meetings, website visits, event attendance and trading, and leverage AI-backed indicators to engage investors that are most likely to take a position in your security.



## Refine your targeting approach

Identify new investors in a growing database of over 320K institutions, funds and individuals. Rethink each targeting exercise by diving deeper into institutions' attributes and exposure.



## Scale personalized investor communications

Seamlessly send personalized emails to large groups of stakeholders directly from Desktop without complex third party tools.



## Plan with improved insights

Access market leading research and estimates, as well as events and transcripts, ensuring your strategy considers the market's take on you and your peers.



## Prepare management for each meeting

Create configurable briefing books exported directly from the Q4 Desktop database and ensure your C-Suite enters each engagement prepared with key investor data.



## Improve how you report your impact

Q4 provides a simplified way to generate complete reports for board meetings and ad-hoc updates. Export activity data, shareholder changes and other key insights or take advantage of our exceptional service to customize reports.

# Unparalleled Customer Success

Whether you require more assistance in proactively engaging the street, or hope to uncover deeper, more meaningful insights about your shareholder base, the Q4 team is uniquely positioned to help you reach and exceed your expectations.

## Premium Client Support

Take advantage of an expert team that can help you better leverage our tools and insights and maximize your ability to attract new capital. Desktop clients are each assigned an IR Manager to ensure you get the most out of the platform.

### EXAMPLE SERVICES:

- Historical data migration
- Investor targeting reports
- Briefing books for roadshows and conferences
- Board reports and ad hoc executive updates
- Quarterly earnings preparation
- Investor engagement reports



## Features

### OWNERSHIP

- Premium Ownership
- Stock Quotes and Charts
- Peer Comparison
- Fund and Firm Information
- Live Updating Market Commentary
- News and Press Releases
- Stock Surveillance Integration

### CRM

- Customizable Dashboard
- Centralized Activity Tracker
- Reporting
- Calendar
- Universal Search
- Tagging

### TARGETING

- AI-Backed Targeting Tool
- Search by Preferred Filters
- Contact Database (Institution, Fund, Individuals)
- Briefing Book Builder

# Features

## CRM EMAIL

- Corporate email sync
- Personalized mass communication
- Automatic email tracking in individual contacts

## Q4 GO MOBILE APP

- Mobile activity management and logging
- Ownership trends and analysis
- Contact, institution and fund level search

## CUSTOMER SUCCESS

- Q4 IR Manager

# Additional Features

## RESEARCH & ESTIMATES

- Detailed Earnings Estimates
- Consensus
- Up-to-date research reports

## EVENTS & TRANSCRIPTS

- Searchable Transcripts
- Earnings/Corporate Events
- Sell-Side Conferences
- Event Calendar

## ENGAGEMENT ANALYTICS

- Investor Engagement
- Activist Monitoring
- Peer Benchmarking

Turn Insights into results today.

Q4 is trusted by over 2650 of the worlds leading brands.





LET'S TALK

## About Q4 Inc.

Q4 Inc. is the leading provider of IR Ops software with the world's largest set of proprietary investor data, purpose-built to remove obstacles between public companies and their investors. Q4 gives investor relations leaders, C-Suite Executives and their teams the tools to attract, manage, and understand investors — all in one place. The AI-enabled Q4 Platform boasts applications for website and event management, engagement analytics, and overall lifecycle management, including AI Earnings Co-Pilot to generate draft scripts based on historical data, and AI earnings call summaries to understand peer sentiment. The Q4 Platform also includes a streamlined investor CRM and shareholder intelligence with enhanced metrics to elevate investor targeting strategies within the platform. Q4 delivers the data, insights, and workflows that give IR teams the power to focus on what really matters: strategy, relationships, and driving premium valuations for their companies.

The company is a trusted partner to more than 2,600 public companies globally, including many of the most respected brands in the world, and maintains an award winning culture where team members grow and thrive.

Q4 is headquartered in Toronto, with an office located in London. Learn more at [www.q4inc.com](http://www.q4inc.com).

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