

## Athena Equity Research Management System

Athena ERMS provides a fully featured platform for Equity and Credit Analysts and Portfolio Managers that supports highly integrated and automated modules for tracking internal and external research, consolidating Fundamental Data, Modeling Estimates and linking research to positions and trades.

### Key Features:

- An easy-to-use platform for tracking all relevant information relative to an assets expected performance
- Standard equity pricing evaluation models included.
- Support for proprietary pricing models as add-ins
- Extensive Text/File Management Features including Document Management
- Fundamental Data History with support for automated updated from many data services
- Integration with accounting or data warehouse to provide trade history and current position information
- Ability to link actions with research snapshot
- Extensive asset filtering capabilities
- Full Data Encryption

### Data:

Extensive support for all relevant data elements including:

- Descriptions
- Identifiers
- Sectors/Industries
- Quarterly and Annual Fundamental Data
- Scenario Assumptions (Current and Historical)
- Price and Price History
- Trade History
- Current Positions
- User Defined Fields

### Pricing Models:

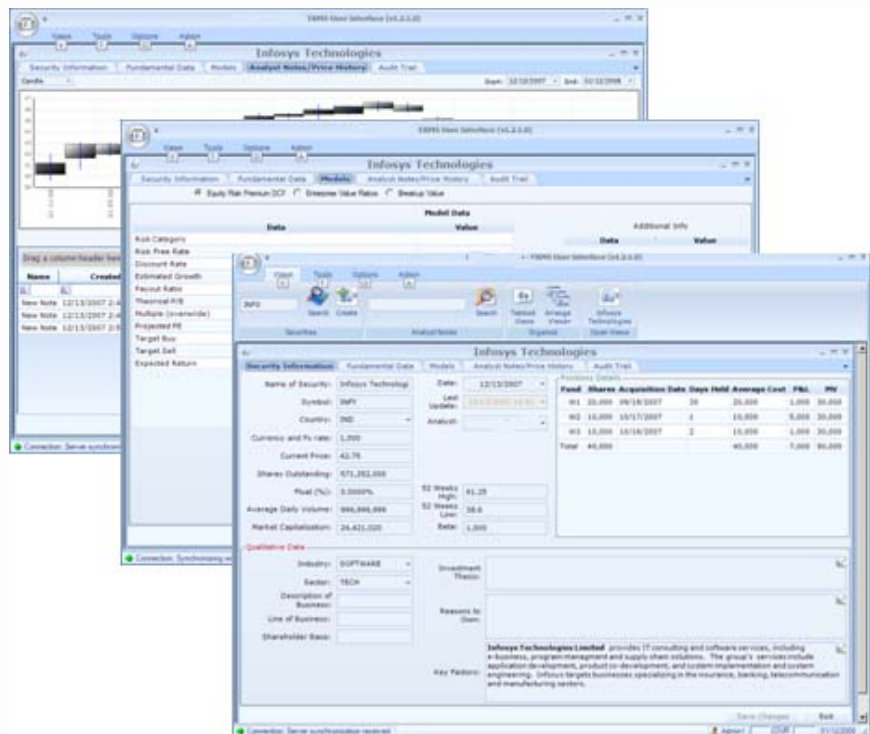
- Support for Discount Cash Flow, Relative Value and Breakup pricing models
- Ability to include client proprietary models
- Ability to link trading decisions to models

### Notes/Document Management:

- Inline Word processor
- Ability to embed all document types including .PDF, Word, Excel, Power Points, and screen snapshots from any application/data source
- Full Text Search for all Notes

### Interfaces:

- Market Data
- Research Providers
- Accounting Systems
- Fund Administrators
- Fundamental Data
- Order Management Systems
- Custodians/Primes



### Technology:

- Local or Hosted
- Native C# or Browser Based
- Services Oriented Architecture with support for several queue services
- SQL 2005
- Requires .NET 2.0