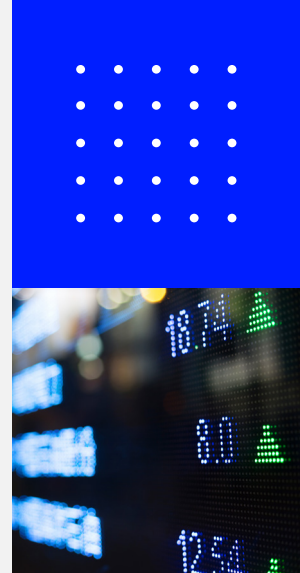


LSEG StarMine for Retail Wealth

Optimise your investment goals and mitigate risks with our robust models and advanced analytics



Overview

Today, no one can sit back and react to the market. Investors must reliably predict what the market will do, where it's headed, where the gaps fall and when the trends start.

LSEG StarMine for Retail Wealth provides retail investors with advanced analytics and models often only available to institutional investors, hedge funds, quantitative researchers and data scientists.

Using StarMine models and analytics in your investment process is like adding an entire research department of PhD-level experts to your investing arsenal.

Grounded in sound economic intuition and backed by rigorous analysis, LSEG StarMine's robust models and analytics help you identify opportunities, gain insights and zero in on the most viable investment ideas to achieve higher returns.

Models and analytics

Our analytics and models cover critical areas including momentum, value, smart money, risk, sentiment, and mergers and acquisitions. In total, you get access to 16 models and analytics as well as a comparison of top 10 peers. In addition to this, customers have the option to compliment the package with our **StarMine MarketPsych Media Sentiment Model** which measures sentiment across a range of news and social media platforms*.

Find the full list and descriptions of the models and analytics in the appendix or [reach out to our teams to explore how our insights can boost your trading success.](#)

Key benefits

Make informed decisions with advanced analytics

- Identify trends and seize profitable opportunities ahead of other market participants
- Make decisions faster with models built by in-house data experts using industry-leading data, saving you time and cost

Discover more profitable opportunities

- StarMine has a long and proven track record in successful predictive modelling
- We leverage factors that are often overlooked, so you benefit from better alpha generation and risk management in your portfolio

Master the market with research that tracks success

- We assess the credibility and track record of sell-side research, ensuring you make more informed decisions

Delivery

Data is updated end of each day and is delivered via API. It is available in two packages:

1. Standard – Private password protected
2. Premium (includes five years history) – Professional Internal

*StarMine MarketPsych Media Sentiment Model is sold separately.



Appendix

Models and analytics	Overview	Benefits	Measure
Models			
Analyst Revision Models (ARM) <i>(This includes 5 ARM Model scores and model components – Region, Recommendation, Revenue, Secondary, and Preferred Measure)</i>	The model tracks analysts' changing opinions on companies' prospects based on their earnings estimates. Positive revisions suggest growing confidence, while negative revisions may indicate concerns.	<ul style="list-style-type: none"> – Understand whether the expert financial community is growing more optimistic or pessimistic about a company's prospects – Get a sense of where a stock might be headed, enabling you to make better predictions 	Scored from 1-5 1 - Analysts forecast a poor performance 5 - Expectations of strong performance
Price Momentum Model	The model looks at short-term and long-term price trends as well as price momentum at the industry level.	<ul style="list-style-type: none"> – Spot trends – Identify potential opportunities and time your trades to maximise your profits 	Scored from 1-5 1 - Weak price trend, potential underperformance 5 - Rising stock momentum, potential outperformance
Intrinsic and Relative Valuation Model	The model analyses a company's fundamentals (e.g. cash flows, earnings etc.) combined with its relative valuation against others in the market so you get the full potential of a stock's value.	<ul style="list-style-type: none"> – Determine if a stock is overvalued or undervalued 	Scored from 1-5 1 - Stock is considered overvalued, potential underperformance 5 - Stock is considered undervalued, potential for outperformance
Earnings Quality Model	The model assesses various financial metrics and accounting practices to determine the reliability, transparency and sustainability of reported earnings by any company.	<ul style="list-style-type: none"> – Identify any red flags or areas of concerns that could indicate earnings manipulation, aggressive accounting practices or financial irregularities – Avoid financial pitfalls – Minimise risk by identifying companies with poor earnings quality, which is a strong indication that they may be susceptible to financial distress – Benefit from long-term sustainability and invest in companies with high-quality earnings 	Scored from 1-5 1 - Suggests company's earnings may not be sustainable or reliable 5 - Suggests company's earnings are sustainable and reliable
Smart Money Models – US Insider Filings – US Short Interest – Smart Holdings)	These models monitor where seasoned investors are putting their money to work, analysing patterns and signals to identify their investment choices.	US Insider Filings <ul style="list-style-type: none"> – Keep an eye on what company insiders (executives, directors, etc.) are doing with their shares US Short Interest <ul style="list-style-type: none"> – Get a view into the number of shares that have been sold short and take advantage of opportunities such as potential short squeezes Smart Holdings <ul style="list-style-type: none"> – Analyse where institutional investors are putting their money and get insights into which stocks or sectors might be promising or which ones to avoid 	Scored from 1-5 1 - Suggests scepticism, potential underperformance. 5 - Suggests confidence, indicating expected outperformance
Combined Alpha Model	The model evaluates a company's overall health and growth potential by analysing factors such as management effectiveness, future earnings outlook, competitiveness, and market sentiment, aiming to identify investments that outperform the market benchmark.	<ul style="list-style-type: none"> – Get a complete and reliable picture of which stocks are likely to outperform the market 	Scored from 1-5 1 - Indicates negative outlook 5 - Signals a positive consensus, potential outperformance
Credit Risk Model	The model assesses the likelihood of a borrower defaulting on their debt obligations.	<ul style="list-style-type: none"> – Minimise risks by identifying companies with a likelihood of defaulting or bearish sentiment 	Scored from 1-5 1 - Indicates high credit risk, potential financial instability 5 - Implies low credit risk, indicating financial stability
M&A Target Model <i>(Offered as a separate package)</i>	The model provides valuable insights into which companies may experience increased stock value due to potential acquisition interests. By identifying these targets, investors can strategically allocate their funds and potentially capitalise on future mergers and acquisitions that could drive up stock prices.	<ul style="list-style-type: none"> – Identify companies that are potential targets for mergers and acquisitions (M&A) – Gain an edge and take advantage of price movements due to M&A activity 	Scored from 1-5 1 - Low likelihood of the company being an M&A target 5 - High likelihood of becoming an M&A target
MarketPsych Media Sentiment Model	The model looks to understand what is being said about a company, stock market or specific sectors in news and social media platforms.	<ul style="list-style-type: none"> – Predict market movements by understanding bullish or bearish sentiment 	Scored from 1 to 100 1 - Suggests negative media sentiment, indicating underperformance 100 – Indicates positive media sentiment, suggesting potential for outperformance.

Analytics			
Predicted Surprise	Predicted Surprise uses advanced algorithms to anticipate if a company's earnings report will differ significantly from analyst predictions, known as an earnings surprise. It helps investors foresee potential market movements before they occur, enabling strategic investment decisions.	<ul style="list-style-type: none"> – Identify potential earnings surprises before they are announced – Anticipate market movements in advance – Helps in making strategic investment decisions – Provides an opportunity to capitalise on the stock movement resulting from earnings surprises 	Scored: Negative/ None/ Positive Negative – Likely to miss earnings expectations None – Expected to meet earnings predictions Positive Surprise – Likely to exceed earnings expectations
Short Squeeze Indicator	Short Squeeze Indicator signals stocks likely to surge due to short squeezes, offering savvy investors a chance to profit from the volatility.	<ul style="list-style-type: none"> – Alerts investors to stocks with potential sudden price jumps – Provides an opportunity to capitalise on the price increase – Highlights the risks involved in short selling 	Scored: Negative/ None/ Low Negative – Low chance of a short squeeze, short sellers are secure None – No clear short squeeze signal Positive – High likelihood of a short squeeze, potential for price jump
Bold Estimates	Bold Estimates are a strong prediction by a top rated analyst about a company's financial performance, (e.g. earnings) that differs significantly from other analysts' forecasts and consensus. Often top star analysts are the first to revise their forecasts and when one of these analysts makes a bold estimate, it signals a major opportunity in the stock.	<ul style="list-style-type: none"> – Provides an early indication of potential shifts in a company's performance or industry trends – Identify opportunities for profit based on strong forecasts that differ from the consensus – Offers insight into market sentiment and analysts' confidence levels regarding a company's future prospects – Make informed decisions based on bold forecasts, potentially maximising returns and mitigating risks 	Scored: Negative/ None/ Low Negative – Analyst forecast worse than market expectations None – Analyst predictions are in line with market expectations Positive – Analysts predict company will do better than market expectations
Revision Cluster	Revision Cluster lets investors know when a group of analysts all change their forecasts for a company's financial performance, in the same direction, within a short period of time. It's crucial because it suggests something important has happened or been discovered about the company that could greatly affect its stock price, for example a new product launch, major contract win or loss and even regulatory changes.	<ul style="list-style-type: none"> – Provides insight into significant developments affecting the company – Anticipate potential impacts on the stock price – Offers an opportunity to capitalise on stock movements resulting from these revisions 	Scored: Low/ Medium/ High Low- Decreasing analyst optimism, indicating scepticism in future performance Medium – Unchanged analyst sentiment High – Increasing analyst optimism, showing confidence in improved performance

[Click here](#) to get in touch with our sales teams today to learn more about how our insights can boost your trading success.

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