

## June 2023 | New Buyside Firm Profile

The IR Insight team is excited to share our new buyside firm profile released over the weekend of June 2, 2023.

### New Buyside Firm Profile

Listening to your feedback, the new firm profile provides the right balance of consistency and customization to meet your meeting preparation needs. Accessible from any download modal where buyside profiles are available, the semi-customizable profile offers options to personalize profiles for your corporate participants, frequently used events, and corporate brand.

### Modern Looking

- Eliminated the 'Excel' tabular look and rigidity
- More control over spacing and page breaks

### Consistently Sized Ownership Chart

Regardless of ownership breadth, the chart will reflect the same periods and scale to easily compare across firms.

- Backfilled with public holdings, as applicable
- Rounded ownership shares
- Event Focused showing event counts or types over time with position.

### New Data Not Currently Available

Options not available currently in profiles, is now available in the new profile.

- If entitled, multiple ticker selection for aggregate ownership
- Cost basis for focus ticker
- Holding company aggregate positions
- Key ownership and event stats.

### Profile Library Customization

In the profile library, the new profile will be pinned at the top from where you can customize elements important to you.

- Event & Ownership settings provide options to select ownership chart size, event overlay options, corporate participant focus, and ticker.
- Branding allows you to choose the color scheme and upload your logo.
- Add a description to your saved profiles for ease of sharing and running.

### Coming Soon

Add-Ons and an Executive version are coming soon!

