Intro-act Scorecard

The Intro-act Scorecard is the C-suite's quarterly assessment of investor engagement designed to optimize your targeting strategy and improve the ROI on your investor access.

Common Use Cases:

- Dynamically determine the KPIs that are most critical for your investor targeting strategy each quarter
- Assist brokers and IR agencies in focusing on compatible investors during corporate-investor access events
- Use predictive analytics to gain an information advantage on your existing owners' next trade direction
- Identify investors that are under-serviced by the sell-side, that are compatible and likely to become owners

Six Factors of Investor Engagement

Concentration
How reliant are you on your top 10 holders?

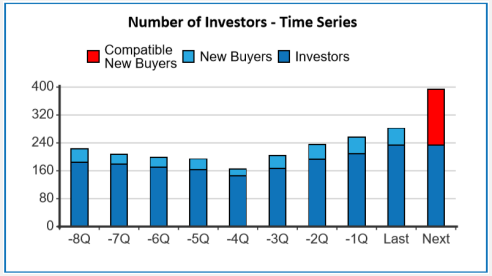
Directionality
Which owners are buying vs selling your stock?

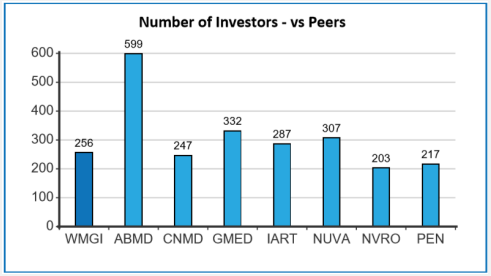
Breadth
How many investors own your stock?

Impact
What is investor exposure relative to peers?

Depth
How much might owners increase their positions?

Duration
How long do investors remain owners?





A Multi-Dimensional Analysis:

Each factor is analyzed on a rolling 8-quarter basis (time series) as well relative to peers (cross-sectional).

For more information, please call 617- 454 -1088, email info@intro-act.com, or visit www.intro-act.com.

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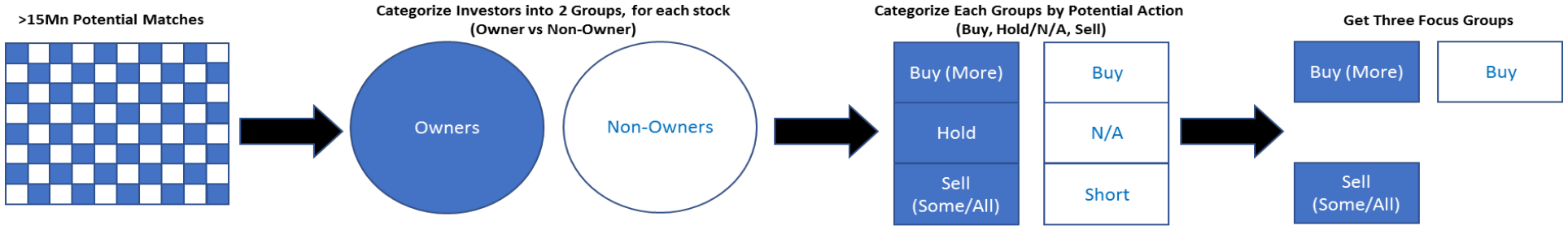
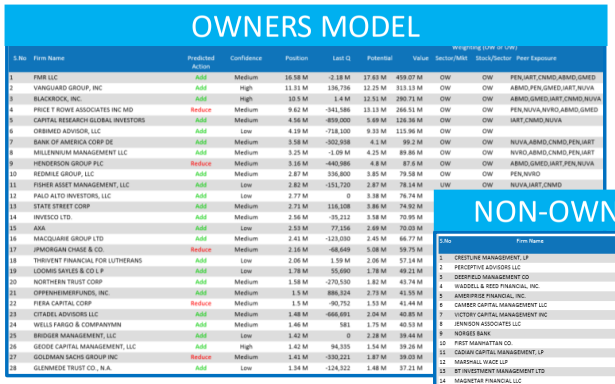
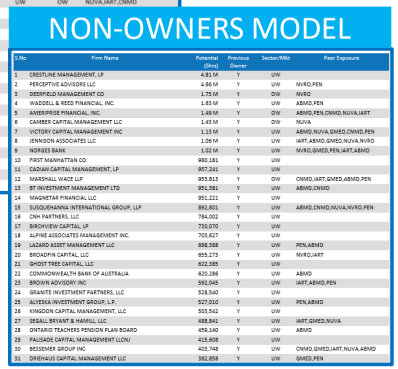
There are >15 million possible matches between the ~5,000 institutional investors that file 13Fs and the >3,000 stocks that are institutionally investable.







TWO CORE MODELS

Owners Model: Know your investors next trade decision. ~1 million of the potential matches are "matched," meaning an active investment exists. Intro-act predicts each owners' next trade (increase, decrease or hold). Random binning would be accurate 33% of the time – Intro-act delivers ~2x that accuracy at ~60%.

Non Owners Model: Identifies new compatible investors. Of the remaining ~14 million potential matches, only ~120,000 will become new matches each quarter. Intro-act predicts 5x this rate (600,000 predictions), of which ~60,000 will be accurate – this translates to ~50% recall demonstrating best-in-class targeting.

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