

# Create Fast, Accurate Investment Research Reports

Quark XML Author for Microsoft Word

## BENEFITS

### Gain a Competitive Edge

Increase your trading volume by producing and delivering personalized reports to clients in print, on the Web, by e-mail, and through digital devices faster than your competition

### Reduce Risk

Improve content accuracy using an automated rules engine and deliver appropriate content to multiple recipients

### Minimize Disruption

Easily integrate Quark XML Author with existing systems and get your research analysts up and running fast with little to no training through Microsoft Word

## Information: The Lifeblood of Investment Reporting

Driven by the timely delivery of investment facts and opinions, every year investment research groups publish more than 800,000 research reports and over 900,000 research notes—more than 6,600 documents per day, or five documents every minute.

When the delivery of information to clients and potential clients is your lifeblood, any reliable advantage that can give you a competitive edge is critical.

In fact, to remain viable in a highly competitive market with ongoing consolidation, you must eliminate the inefficiencies and pitfalls of outdated, manual publishing techniques

that hinder your ability to deliver accurate, personalized information faster than your competitors. You must find a way to:

- Comply with corporate rules and government regulations
- Personalize information to meet your clients' individual needs
- Maintain information accuracy and overall quality
- Deliver investment information to clients in the way they want it—via print, Web, e-mail, and digital devices—in the most timely manner and at the lowest cost.

The answer is dynamic publishing.

## Faster, More Accurate Reporting with Dynamic Publishing

Quark's dynamic publishing software helps investment research groups improve the speed and lower the cost of creating, formatting, validating, and disseminating investment research information to multiple audiences across multiple types of media including print, Web, and digital devices.

The software also helps improve compliance, accuracy, and consistency of investment information.

The software:

- Allows research analysts to easily create reusable, or structured, content using the familiar Microsoft Word environment

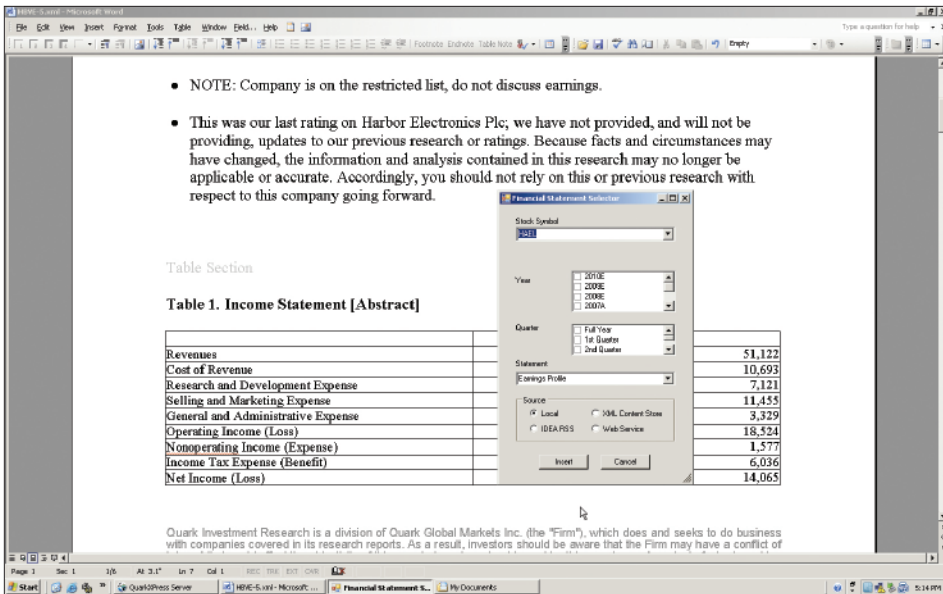
- Eliminates error-prone, manual work
- Integrates narrative content with content from data sources, such as databases and spread-

sheets, to streamline the authoring process

- Ensures that only authorized personnel can edit protected information
- Streamlines the content and legal review processes
- Integrates with enterprise content management systems, including IBM FileNet Content Manager, Microsoft SharePoint, and EMC Documentum
- Automates the publishing of investment research to print, Web, e-mail, and digital devices.

**"We see Quark XML Author for Microsoft Word as the right match for the authoring needs of investment research and other kinds of structured financial analysis and writing."**

Bill Trippe, Vice President & Lead Analyst, Content Strategies, Gilbane Group



Using Quark XML Author for Microsoft Word, research analysts can create valid XML content and submit it directly to enterprise content management systems for faster, more accurate client reporting.

## A Dynamic Publishing System Can Help You:

### Increase revenue opportunities by publishing more reports faster

- Creating and publishing information faster than the competition can lead to a higher closing rate.
- Improved personalization helps present the most relevant information and better highlights the benefits of an investment opportunity for a specific client or audience.

### Speed content creation by making reuse of existing content easier

- Finding content that is stored in a content management system (CMS) as reusable components is easier and faster than searching for content in whole documents that are stored in a CMS.

- Structured content can easily be repurposed for delivery to multiple audiences and output types, including print, the Web, e-mail, and digital devices.

### Ensure compliance with regulatory rules and improve content accuracy

- Reduce production time and errors by automatically merging content created by investment analysts with content from various data sources, instead of manually copying and pasting or retyping numbers.
- Reduce manual effort to ensure content compliance by using an automated rules engine
- Reduce production costs by automatically publishing to multiple channels

## The System Consists of:

- Quark XML Author, an add-in to Microsoft Word that lets anyone easily create XML documents with no knowledge of XML and little or no training. Quark XML Author leads the next generation of XML authoring tools, helping organizations make XML authoring widely available so they can broadly reap the improvements in productivity and information quality that XML delivers through its role in dynamic publishing systems.
- Quark XML Author CMS adapters for Microsoft SharePoint, Documentum, and IBM FileNet Content Manager

## Optional components:

- QuarkXPress
- Quark Publishing System
- QPS Portal Services
- QuarkXPress Server

## Why Quark XML Author?

### Only Quark offers:

- A new approach to automated dynamic publishing using Microsoft Word together with Quark's industry-standard publishing technologies
- An end-to-end publishing system from content creation, through integration with leading content management systems, to multichannel publishing
- Technology that can be easily integrated with existing business systems

For more information about producing fast, accurate investment reports with Quark XML Author, visit [www.quark.com](http://www.quark.com).

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