



## SOLUTION OVERVIEW

# Robotic Process Automation for Equity Research

## Key Capabilities

- ◆ **Versatile software robotics:** Kofax Kapow™ robots interact with virtually any Web site or enterprise application, trigger responses, apply business rules, and communicate with systems just like humans, only without breaks or mistakes, and at much lower cost
- ◆ **Superior scalability and proven large scale robotic automation deployments:** Several top equity research firms in the world have deployed thousands of robots to intelligently collect, transform, and deliver valuable research data from the Web and other sources
- ◆ **Unified design tool with live interactive robot building:** Built for the business analyst and powerful enough for the developer. Designers build robots in a matter of hours in real-time against live web sites, Excel, and other applications, and data sources
- ◆ **Robot management and built in analytics:** Easily manage and monitor large robot deployments, detect problems, and schedule robots to run

## Benefits

- ◆ **Differentiate from the competition:** Run up to 80% more extensive searches and collect data from more than one billion web sites available today
- ◆ **Empower analysts to take on more research:** Increase workload and employee productivity by up to 200%
- ◆ **Eliminate risk:** Helps to eliminate risks associated with exposing proprietary and sensitive data to 3rd party providers and outsourcing vendors
- ◆ **Keep up with research demands via automated data feeds:** Automatically get up-to-the-minute data for predictive trend analysis and obtain valuable information that effects buy/sell decisions and faster entry into new markets.



## Supporting the Research Needs of Equity Research Teams

With the mass amount of available online data, obtaining the precise, accurate and timely data that investment research analysts need to make informed decisions is an ongoing challenge. The depth and quality of your research depends on the ability to obtain targeted information and gain insights that support your investment strategies.

But what if the data you are trying to collect is spread across hundreds, if not thousands, of websites? What if critical data is buried deep within these sites, and user interactions are required— such as performing searches or providing user login information— in order to reach the data you are looking for? This is where the process of acquiring and delivering the data to your investment research analyst falls short and becomes a real challenge for many financial research teams today.

If you have tried using open source web crawlers, web scrapers and scripts, you probably have had limited success in getting all the data you require. To compound the problem, the data returned by these tools is not readily usable. It also requires data research analysts to cleanse and correct it before it can be turned into actionable information and leveraged within business intelligence software.

## The Solution: Robotic Process Automation for Equity Research

We realize research projects are driven by a need to answer a specific set of questions now versus weeks or months from now when the analysis is not relevant. In many cases, IT resources are not available to help support these project initiatives and the data research analysts are on their own.

The Kofax Kapow robotics process automation (RPA) solution automates the collection of publically available web data—including sector and government data, news, blogs, and operational data (e.g., product availability, pricing, manufacturing capacity, inventories, and hiring activity), that research analyst rely on to investigate markets and companies, their competitors and the industry in general. Kapow empowers research analyst to stay informed and make better decisions by automating data extraction from web feeds that are constantly updated with new and valuable information.

The Kapow robot design studio environment is powerful enough for IT developers, but easy enough for a data research analyst to use. Through the Kapow visual design studio, a technical or business user quickly builds a software robot that robots that simply mimic what a user does, trigger responses, and communicate across virtually any web site, portal, or enterprise system. The live robot building enables designers to test and see immediately how the data is being extracted from a web site and processed.

### Hard to Reach Information Not a Problem

In many cases, getting data from a website requires the ability to navigate through a site that requires authentication, or performing actions such as building a search query in order to retrieve a list of results you are looking for. With Kapow, robots automate these interactions with any website are built within a few hours.

The sophistication and scalability of Kapow makes the volume and variety of financial and market data that can be extracted by Kapow on the order of magnitudes, better than what most research teams are experiencing today.

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***“Kapow revolutionized the way we supply our research team with information, delivering unprecedented accuracy and data quality,” noted the spokesperson. In doing so, it greatly enhanced team members’ efficiency and ability to deliver greater value to our customers.”***

— Bank spokesperson

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## Fresh Insights into Markets and Customer Behavior

With the large volumes and variety of information available on the web, imagine how it could be leveraged in understanding micro trends, emerging markets, tracking specific companies, collecting inventory data and more. At the end of the day, researchers want to connect the dots between the various data-sets that will ultimately deliver fresh insights into markets and customer behaviors.

Kapow robots helps financial research teams broaden their research data sets where other technologies fall short, and manual human work simply cannot keep up with the project demand and ever evolving variety of data available. Kapow robots helps research teams answer critical questions for institutional investors such as retail pricing discrepancies, inventory concerns or demographic analysis.

## Automating Data Transformation and Delivery

The transformation of the data is equally as important to a research project since the data not only needs to be extracted, but also enhanced and enriched into a format that meets the analyst research needs. Many tools lack this important automation step. Kapow robots transforms the data into any format needed and delivers it right to your databases and data warehouses, making the data instantly accessible by business intelligence software.

**Case study:**  
Global Financial Services Company

**Challenge**

Corporate, institutional and private wealth management clients from around the world come to this company for trusted economic forecasts, investment strategy and insights. When the firm investigates a new investment topic or prepares a report for a client, its analysts frequently turn to the web to gather much of the information needed to inform their research and analysis.

**Solution**

Analysts take advantage of Kofax Kapow to inform a variety of research outputs, including stock recommendations, which are compiled based on publicly available financial and operational data from individual companies. The company also uses the insight to publish customized reports, used by institutional investors to solve critical problems such as retail pricing discrepancies, inventory concerns and demographic analysis by store locations.

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*“In the past, it could take many weeks of work to prepare a single report for a client; today, teams can turn the same reports around in a single week.”*

— Bank spokesperson

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For more information, visit [kofax.com/RPA](http://kofax.com/RPA)

