



Capital Markets | Montreal | Founded: 1999 | Employees: 40 | www.inovestor.com

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BLOOMBERG:

<https://www.bloomberg.com/research/stocks/private/snapshot.asp?privcapId=158625898>

LINKEDIN: <https://www.linkedin.com/company/inovestor/>

FACEBOOK: <https://www.facebook.com/Inovestor-inc-171005992970002/>

COMPANY OVERVIEW

Inovestor offers a suite of software, data, and service products for financial advisors, institutions, and medias. Some of its areas of expertise include enterprise eCommerce solutions; datafeed services; turn-key financial websites; investor relations solutions, fundamental data, and IPO coverage. The firm also sponsors a NASDAQ Index (NQICA) and operates an ETF (TSX: INOC).

SENIOR MANAGEMENT

Pascal Lefrancois: Founder & CEO, (1999-Present-); B.Sc University of Quebec in Montreal (1991-1994), MBA. McGill (1998-1999);

Francois Soto: VP Financial Research, (2016-Present-); BBA. HEC Montreal (2002-2005), MBA. HEC Montreal (2009-2011), CFA; Previously: Quantitative Strategist, Variant Perception (2010-2011); Financial Analyst, CTI Capital (2006-2014)

Benoit Parenteau: IT Director, (2007-Present-); Inovestor since 05 2000. Université de Montréal (2000-2004); Previously: Developer, Inovestor (2000-2003); Lead Developer, Inovestor (2003-2007)

HISTORY: Founded in 1999, Inovestor initially provided financial information to the media. The product and brand then evolved to include an automated security selection and portfolio monitoring system for Canadian investors. A series of acquisitions in the financial data industry, beginning in 2004, enabled the firm to purchase Stock Guide from Toronto, and StockPointer in 2011, to establish itself in the analytical software industry. Today, StockPointer generates reports on more than 7,500 North American companies.¹ In 2017, Inovestor launched its own ETF in partnership with Horizons called the Inovestor Canadian Equity Index ETF (INOC).²

KEY CORPORATE DEVELOPMENTS: <http://www.inovestor.com/en/resources/>

2004: [Stock Guide Acquisition](#)

Apr 11, 2011: [StockPointer Acquisition](#)

Jan 19, 2016: [Inovestor Expands to Greenwich, CT](#)

Jul 04, 2017: [Inovestor Asset Management Obtains Portfolio Manager License From AMF](#)

Nov 14, 2017: [Horizons ETFs Launches an Canadian Equity Index ETF](#)

¹ <http://www.lesaffaires.com/bourse/nouvelles-economiques/un-portefeuille-quebecois-fait-son-entree-au-nasdaq/592413>

² <https://www.newswire.ca/news-releases/horizons-etfs-launches-an-innovative-canadian-equity-index-etf-657434933.html>

BUSINESS HIGHLIGHTS

STRATEGY: Investor products over the complete spectrum of the financial services industry including software, data, custom development services, IR platforms, advisory, and their own investable products (TSX:INOC). The firm is differentiated by its industry experience as it was founded in 1999 and has proven itself by developing products that are used to manage over \$27B in assets.³ Its core competency is the sale and application of its proprietary financial databases and quality assurance systems including 30 years of SEC filings that can be aggregated with 250 standardized data fields. The firm has a strong partnership with NASDAQ and in 2016 they launched the Nasdaq Ino Investor Canada Index (NQICA) to “provide exposure to high quality Canadian companies that generate shareholder wealth, while trading at attractive multiples.”⁴

PRODUCTS / PRICING: Ino Investor offers over 35 products but its main offerings are separated into three markets: Financial Advisors, Financial Institutions, and Media IR Fintech.

1. Financial Advisors: Ino Investor for advisors is a cloud-based platform that assists with stock analysis, portfolio management, and customer presentations. Key features include access to their flagship StockPointer tool (a 12-factor model that covers over 9,000 corporations to fund undervalued stocks), autogenerated research reports ranging in depth from a brief summary to a four-page report, and autogenerated customer material that provides visual aides and summaries for a customer’s holdings. Subscribers also have the option to use SMA platforms, factor-based overlay, and a one on one financial concierge service to create customized model filters.⁵
 - a. Pricing: Individual (1 License)- \$249/Month, Team (5 Licenses)- \$399/Month, Corporate(Discounted Per Seat Access)-\$1299/Month
2. Financial Institutions: Ino Investor’s professional stock researching tool for financial institutions is StockGuide, a stock screener that provides clients with over a decade of historical data with over 25,000 data points on 1,000+ companies covering more than 95% of the market capitalization of the Toronto Stock Exchange (TSX). StockGuide is accessed through GRID, a cloud based HTML5 platform that consolidates market data, fundamental data, wealth management, and trading information.⁶ The platform also allows users to access APIs and add-ons that control margin requirements and data sets.⁷
3. Media, IR, and Fintech: Ino Investor provides content and material that aims at helping medias deliver more accurate and timely stories. The firm offers financial widgets, articles on various topics such as ETF, IPO, Market Overviews, research analysis for journalists with data mining (such as management compensation). For IR services, Ino Investor offers small caps that normally do not meet coverage requirements the chance to provide information for potential coverage and exposure to analysts, PMs, and investors. The IR service includes access to dynamic charts, stock quotes, historical prices, and options chains.⁸

DISTRIBUTION / LOGISTICS: Ino Investor offers free demonstrations of its market insights and GRID platforms where users can directly subscribe after completing the demonstration. The firm also re-sells data from leading vendors such as NASDAQ’s Dorsey Wright, Watt Street Horizon, and Fundata.⁹ Ino Investors platforms are cloud based allowing users to access them via web browser or mobile device.

³ <http://www.ino investor.com/en/for-financial-institutions/>

⁴ <https://indexes.nasdaqomx.com/Index/Overview/NQICA>

⁵ <http://www.ino investor.com/en/ino investor-for-advisors/>

⁶ <http://www.ino investor.com/en/stock-guide/>

⁷ <http://www.ino investor.com/en/Grid/>

⁸ <http://www.ino investor.com/en/medias-ir-fintech/>

⁹ <http://www.ino investor.com/en/information/>

MARKETING: Inoventor operates a blog where they re-post information about stock picks and the performance of their new ETF. The firm also hosts industry events for Financial Advisors to promote the ETF and discuss topics such as the limits of indexing Canadian equities and the best Canadian stocks for 2018.¹⁰

COMPETITORS:

Q4: Q4 Inc. provides cloud-based investor relations (IR) and capital market solutions to the to the IR industry in Canada and internationally.

Street Contxt: Street Contxt, a fintech company that helps brokerages, independent research providers, and asset managers distribute, manage, unbundle and value research.

¹⁰ <http://www.inoventor.com/en/symposium-financial-advisors-toronto-november-28th-inoventor/>