

SYMPHONY

FOR PORTFOLIO MANAGEMENT AND TRADING

KEY USE CASES

1. **Discuss and track research/ trades/ projects, speak to internal team members, brokers, or sell-side counterparts via chatrooms and 1:1 chats.** This reduces complex email flows, while keeping everyone on the same page. @mentioning specific individuals calls out their attention / action, sending them an additional notification on Mentions. The mobile app also allows you to reply to messages on the go
2. **Filter through sector or region-based contents that are important to you via tagging and signals.** Capture real-time updates on your investments based on your personalized #hashtags for topics, or \$cashtags for firm tickers
3. **Include/leverage market data into trade ideas via third party news applications.** Supplement your trade ideas with market data, all within Symphony
4. **Automatically convert FIX messages and feed them into OMS/EMS systems for downstream consumption, via an IOI bot**
5. **Automatically translate PM trade instructions into orders on the internal portfolio management system, via a portfolio manager bot,** to allow the team to focus on trade review and pre-trade compliance instead of manual trade entry

RECOMMENDED ROOMS

- [Asset Class] PM and Trading (e.g. Equities PM and Trading)
- [Region] [Asset Class] Chat (e.g. EMEA Credit Chat)
- [X sector] Chat (e.g. Tech Sector Chat)
- EXT: [Client X]/ [Firm / Desk] Coverage (e.g., EXT: BlackRock/ A Bank FX Coverage)
- Trade Confirms: S&T / Operations

RECOMMENDED USER DESKTOP SETUP

- **Text layout:** small font size, condensed info density, and 24 hr w/ seconds time format
- **Folder organization:** separate out internal content and research into its own folder to keep everything together. Segment the rest by internal and external folders
- **Workspace:** keep important client chats and a macro/research room pinned. Keep client chats on the same side to visually distinguish between internal/external

SYMPHONY

GET STARTED WITH #TAGGING FOR PORTFOLIO MANAGEMENT AND TRADING

#HASHTAGS FOR PORTFOLIO MANAGEMENT AND TRADING

GENERAL

#ToDo
#ToRead
#Portfolio[Name]
#Project[Name]
#Urgent
#TradeBreak
#SOD (start of day)
#EOD (end of day)

ACTION

#BlockTrade
#AXE
#BetBuy
#BetSell
#Tradeldea
#ECMdeal

REGIONS

#APAC
#LATAM
#AMERICAS
#EMEA

ASSET CLASS

#Equities
#Rates
#Credit
#FX
#Commod
#Prime
#BSM

FX / CURRENCIES

#USD
#GBP
#USDGBP
#EURJPY

CONTENT TYPE

#IQ
#Movers
#Research
#MustRead
#Trending
#CN (company-specific)
#ERN (earnings)