

SYMPHONY

FOR SALES AND TRADING

KEY USE CASES

1. **Distribute trade ideas, news, and research content to your trading teams or buy-side clients via chatrooms or 1:1 chats.** Use draft mode to compose longer messages such as morning notes to your clients, and utilize the read-receipts to check which of your clients have read through your messages
2. **Discuss sell-side deal collaboration across the internal deal team members via private chatrooms.** Private chatrooms allows you to control who can join/access the chatroom. You also have the option of keeping the chatroom hidden from search
3. **Curate content by sector or region from researchers, other traders, or clients via signals and following research analysts.** Get alerted when colleagues/clients send information tagged with the sectors/topics you are following. Follow research analysts to get notified when they post research notes on their walls
4. **Include/leverage market data into trade ideas via third party news applications.** Supplement your trade ideas with market data, all within Symphony
5. **Automatically extract recap of all trades of the day** without having to manually refer to other systems or track chats, **via a Symphony EOD sales recap bot**
6. **Automatically run through pre-deal checks** such as KYC, account opening status, completion of legal/MSA, credit limit, etc. **prior to executing trades, via a CRM bot**

RECOMMENDED ROOMS

- [Region] Macro Color (e.g., Global Macro Color)
- [Asset Class] Global Chat (e.g., Equities Global Chat)
- [Region] [Asset Class] Chat (e.g., EMEA Credit Chat)
- [X Sector] Chat (e.g., Tech Sector Chat); see Research
- 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 SALES AND TRADING

#HASHTAGS FOR SALES AND TRADING

GENERAL/OPERATIONS

#SOD
#EOD
#Client[Name]
#TradeBreak
#TradeConfirm
#TradeNotSettling
#PriceTarget
#HardtoBorrow
#Locates

ASSET CLASS

#equities
#rates
#credit
#FX
#commod

TOPICS

#IPO
#GDPR
#SecondaryOffering
#Merger
#ERN - Earnings Reporting
#Volatility
#Borrowing
#Covering

RESEARCH/SECTORS

#chem
#financials
#energy
#healthcare
#tech
#industrials
#consumer
#LeadingIndicator
#MarketIntelligence
#MustRead

EQUITIES / CURRENCIES

#Dividend
#IOI
#EPS
#MarketCap
#Stock
#Derivatives
#MutualFund
#CryptoCurrency

REGIONS

#EMEA
#APAC
#AMERICAS
#LATAM