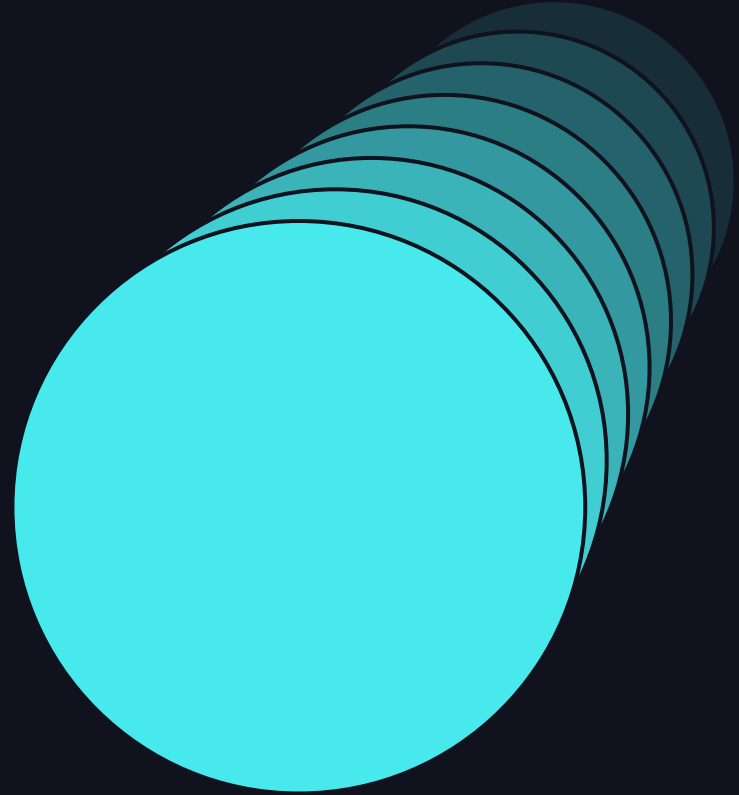


POWER S&P CAPITAL IQ DATA APPS WITH DATABRICKS & PLOTLY



ONIK KURKTHCIAN, S&P GLOBAL
12TH JUNE 2024

AGENDA

From Data to Insights

- Introduction
- Who We Serve: Users and Personas
- What We See: Market and Client Trends
- What We Do: Data to Insights
- Capital IQ Apps: S&P Data + Databricks + Plotly
- Demo: Data Apps



SPEAKER



Onik Kurktchian

Head of Analytical Platforms
S&P Global Market Intelligence

About:

- 8 Years with S&P Global
- Product Specialist across multiple solutions
- Solution Architect, supporting clients pre- and post-sales for data management
- Product Manager for Workbench, Databricks White-label solution
- Capital IQ Data Application Development, building and validating insights

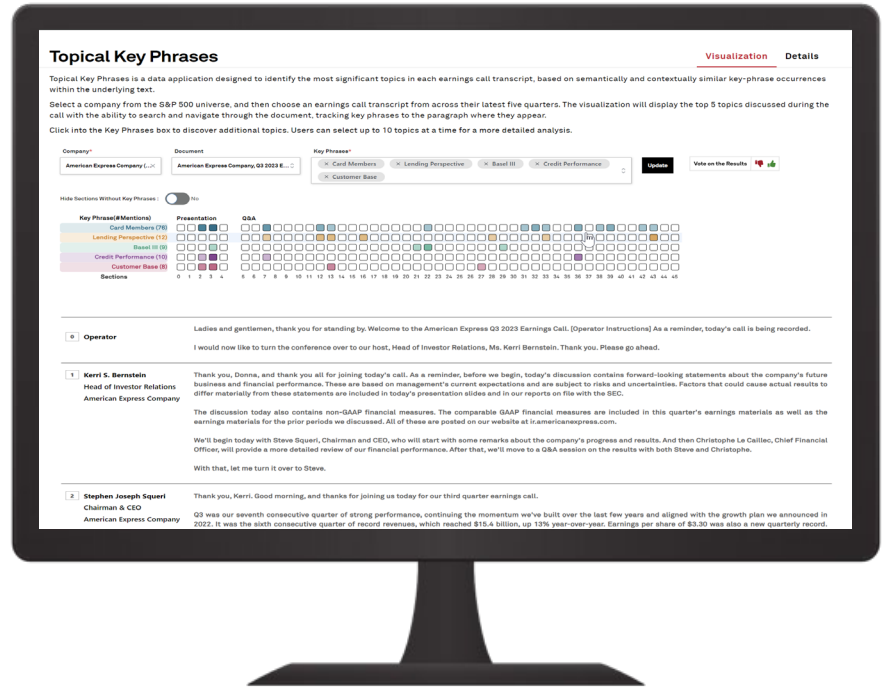
CAPITAL IQ DATA APPLICATIONS

What are they?

Data Application =

Data Visualization + Web Application

An interactive, web-based application, with a visual component, designed to enable a more sophisticated and deep analysis of data to end users.



S&P Global is comprised of five divisions focusing on distinct markets and Kensho for AI solutions

S&P Global

Market Intelligence

Unrivaled insights, leading data, and technology solutions to make decisions with conviction.

S&P Dow Jones Indices

A Division of **S&P Global**

Iconic and innovative index solutions for the global investment community.

S&P Global

Ratings

Credit ratings, research, and insights essential to driving growth and transparency.

S&P Global

Mobility

Insights and data that put our customers at the forefront of innovation in the automotive industry.

S&P Global

Commodity Insights


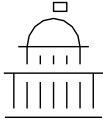

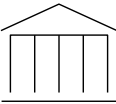
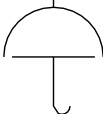




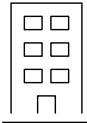
Leading information and benchmark prices for the commodities and energy markets.

KENSHO

Artificial Intelligence accelerator for S&P Global that develops cutting-edge technologies to transform businesses

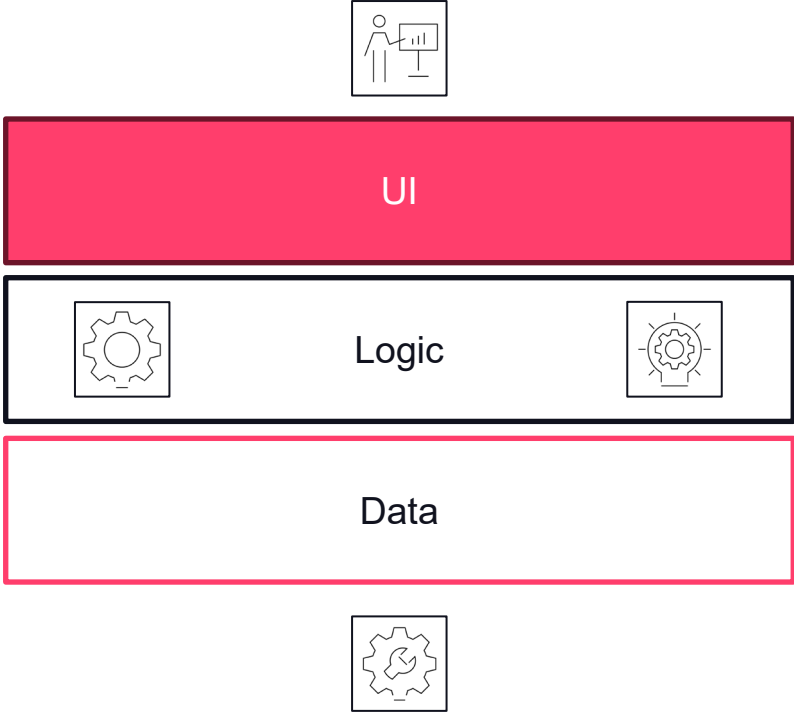
WHO WE SERVE

Supporting research and analysis workflows across client segments

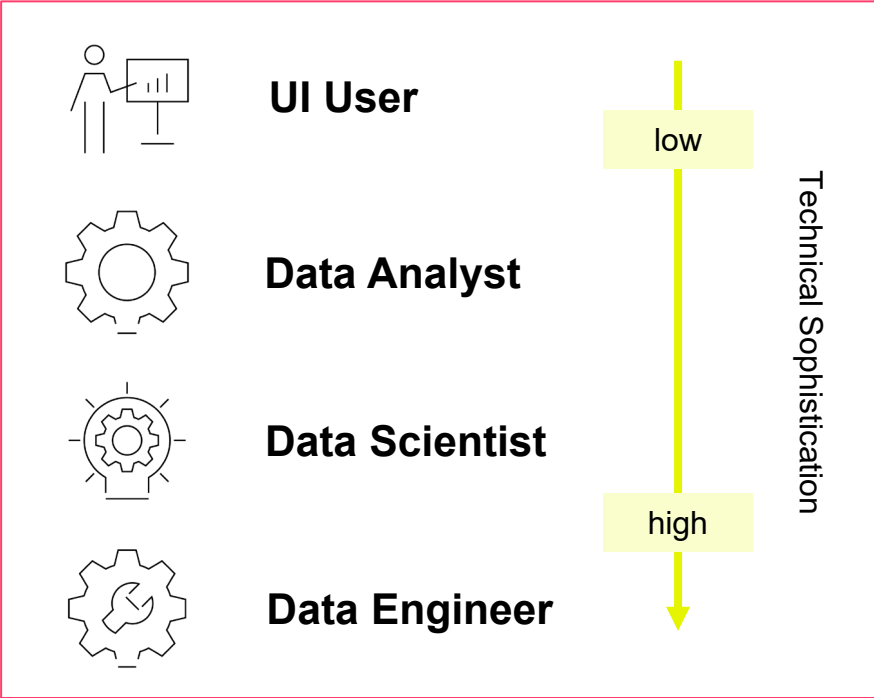
 Academia	 Government & Regulatory Agencies	 Investment Management
 Commercial Banks	 Insurance	 Private Equity
 Corporate Solutions	 Investment & Global Banking	 Professional Services
	 Investor Relations	

WHO WE SERVE

Users & Personas

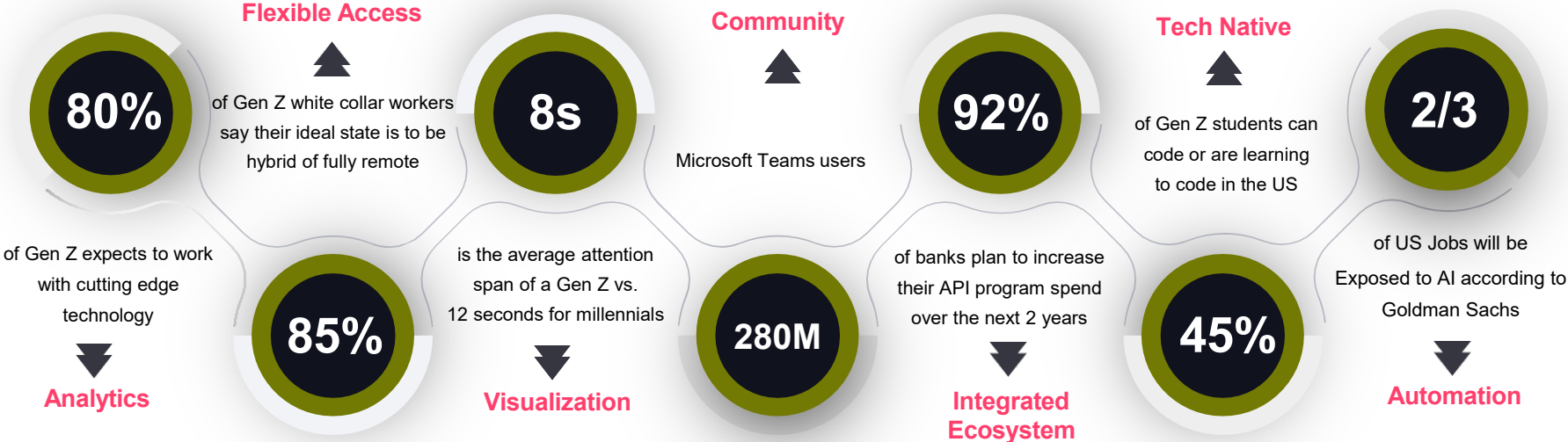


Technical = Writes Instructions to manipulate data for their workflow
...Python, SQL, R, Excel



WHAT WE SEE

Market and client trends are driving the need to think and build differently



WHAT WE DO

What is the process of turning Data to Insights



....



1 DISCOVER



2 EXPLORE



3 EVALUATE



4 PRODUCTIONIZE

Looking For Data

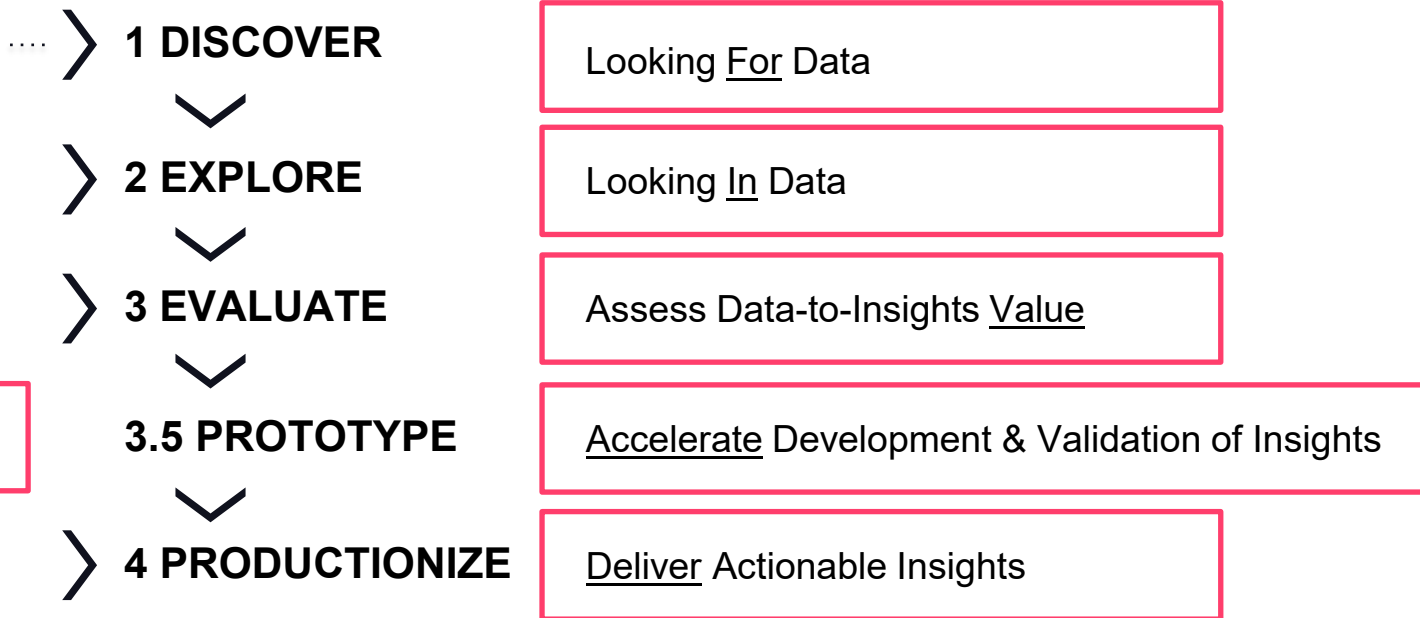
Looking In Data

Assess Data to Insights Value

Deliver Actionable Insights

WHAT WE DO

What is the process of turning Data to Insights

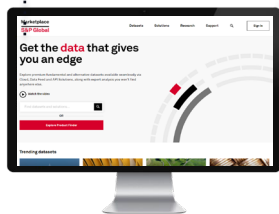


S&P CAPITAL IQ ANALYTICS

Supporting the End-to-End Client Journey



DISCOVER



Capital IQ Marketplace

EXPLORE

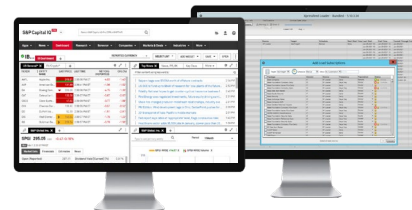


Capital IQ Workbench



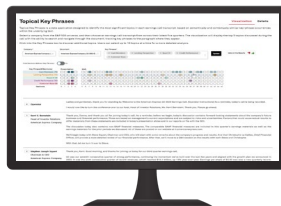
EVALUATE

PURCHASE & SUPPORT

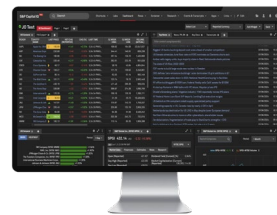


Integrated Delivery Ecosystem
Xpressfeed™ | Cloud | API | Other

VALIDATE



Capital IQ Apps



Capital IQ Pro



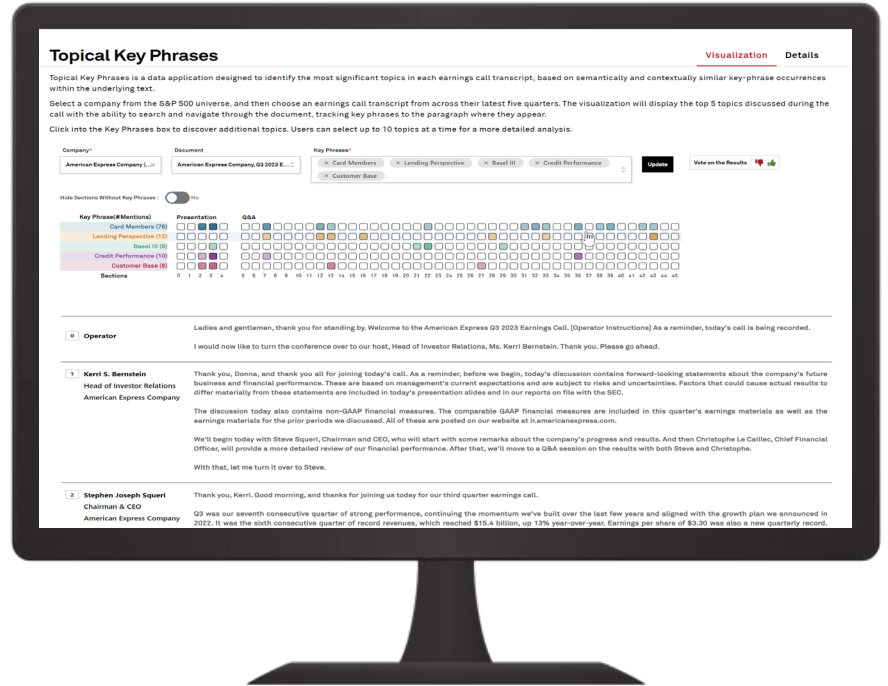
S&P CAPITAL IQ DATA APPLICATIONS

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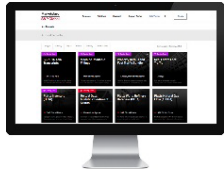
OBJECTIVES

Data

SFTP, Warehouse..



Data Feeds, Cloud & API



Showcase the value
of S&P Global data

Logic

Excel & Notebooks



Excel Plug-in



S&P Capital IQ Workbench



 databricks

Enhance analytics
and integration

UI

Curated Web Experience



S&P Capital IQ Pro



S&P CIQ Data Apps



plotly

Workflow validation before
significant investment

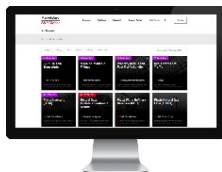
CHALLENGES

Data

SFTP, Warehouse..



Data Feeds, Cloud & API



Ever increasing data estate

Logic

Excel & Notebooks



Excel Plug-in



S&P Capital IQ Workbench



 databricks

Analysts skills & needs
are evolving

UI

Curated Web Experience



S&P Capital IQ Pro



S&P CIQ Data Apps





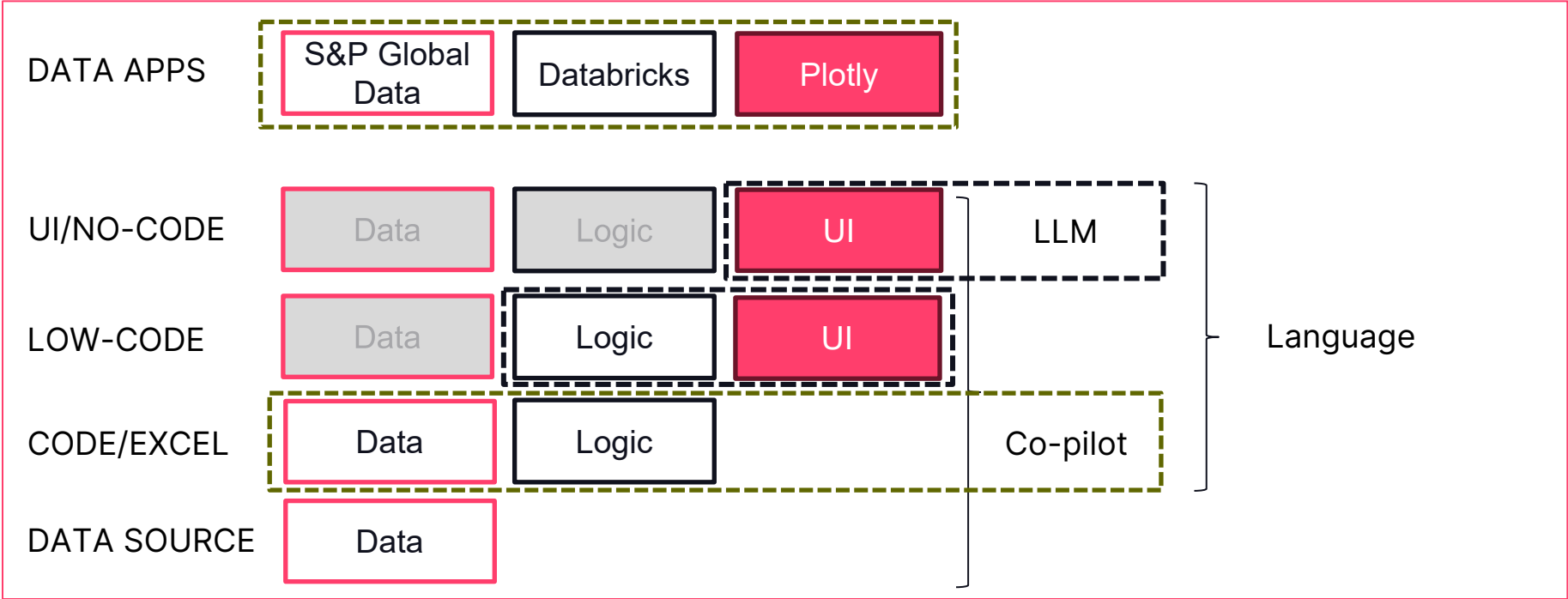
plotly

Prioritization of new
analytics & insights

CAPITAL IQ APPLICATIONS

How do we build?

 Abstracted
 User Interaction



Transcripts Trending Topics

Search and Discover the most mentioned topics within the S&P 500 Earnings Call Transcripts

Highlights



10,000+ earning transcripts processed

- ▶ Since 2017, all earnings call transcripts are continuously processed on a weekly basis.

Search through all transcripts in seconds

- ▶ Optimized storage of the data for all transcripts in Delta Tables via DB Serverless, enabling searching through full history in seconds.

Custom search and aggregation

- ▶ Users can create custom keyword groupings based on what is relevant to their use case.

Benefits



Visualize hidden trends

- ▶ Search any combination of keywords and visualize how many times they have been mentioned.

Download to Excel

- ▶ Users can download the raw data from the visualization to enhance and enrich Excel research.

Faster time to insight

- ▶ These insights were not possible before or required hours of manual effort.

Trending Topics

Visualization Details

Trending Topics is a data application for discovering trends and insights across the current S&P 500 earnings call transcripts universe. For further information regarding Trending Topics, including underlying inputs and methodology, please view the Details tab. To read and access our entire universe of transcripts, visit [Document Viewer](#).

Search for specific keywords within a company, sector, or across the entire S&P 500 universe.

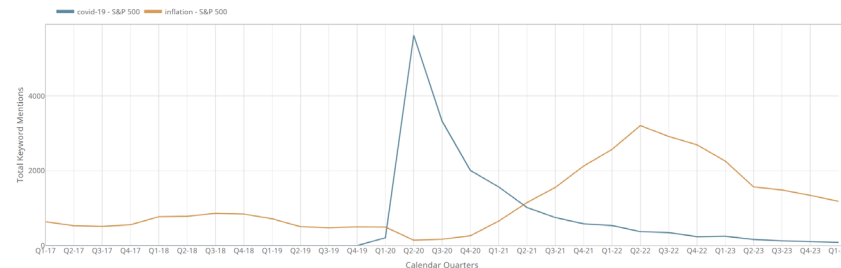
Discover what topics or keywords are trending across S&P 500 sectors.

Full Screen View

Search S&P 500 Sector View

Entity Type: Index
Entity Name*: S&P 500
Keywords*: covid-19, Inflation
Keyword Aggregation: No
Period: 2017 2018 2019 2020 2021 2022 2023 2024
UPDATE CHART

Keyword Mentions



For illustrative purposes only.

Demo

DATA+AI SUMMIT