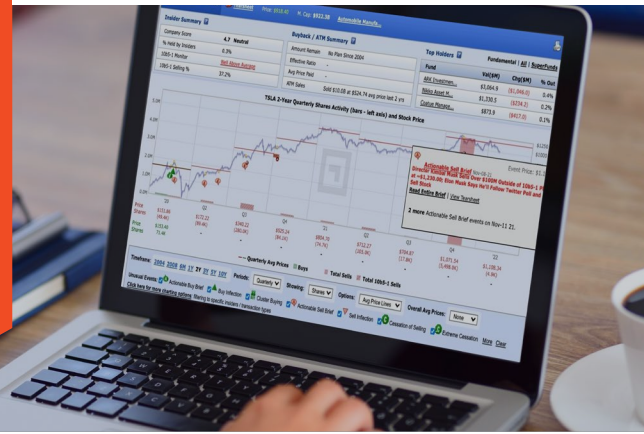




# VerityData | InsiderScore

Differentiated research & analytics on insider, buyback, management change & fund activity.



With InsiderScore, funds have access to 15+ years of the most accurate and complete data along with a stream of research insights delivered daily by VerityData experts.



## Generate Ideas

Powerful screening, structure and context powers your research.



## Manage Risk

Manage positions confidently with a more-diverse data mosaic.

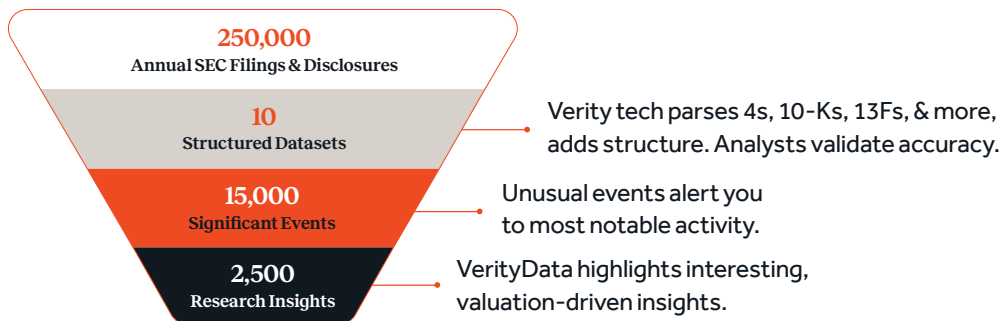


## Stop Losing Time

Reports & analytics let you focus on analysis.

## Proprietary Tech, Powered by People

With proprietary technology and expert analysis, InsiderScore transforms 250,000 annual filings into meaningful insights.



### Tech

- Customizable reports make sure you never miss an important activity.
- Excel templates offer advanced analysis & monitoring.
- Screener powers idea generation and risk management.

### People

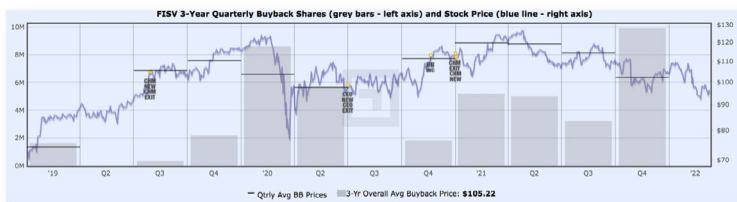
- Verity analysts review all possible valuation-based activity daily.
- Ensure accuracy of datasets.
- Deliver research briefs that get you to decisions faster.

# Datasets Made for Idea Gen & Risk Management

Insider (Position)	Insider IQ	Type	Unusual Event	Trans Score	Shares	Price	Value	Shares Owned	% Change In Shares	Filing	Date
Retar M. Kern (CEO)	***	BUY	100K CEO/CFO Buy	1.3	+6.0K	\$167.79	\$1.0M	130.9K	+4.8%	4	Mar-07-22
Dana Osofsky (Director)	***	10Ks-SELL		-	(15.0K)	\$189.44	(\$2.8M)	309.0K	-4.6%	4	Mar-01-22
Susan C. Altmy (Director)	***	10Ks-SELL		-	(0.3K)	\$200.00	(\$40.0K)	1.9K	-9.3%	4	Feb-15-22
Lance A. Soliday (Chief Accounting Officer)	***	10Ks-SELL		-	(0.4K)	\$209.11	(\$79.0K)	9.1K	-4.0%	4	Feb-15-22
Eric M. Hest (CFO)	***	SELL	CFO Selling > 10%	-1.5	(10.3K)	\$209.50	(\$2.2M)	24.7K	-29.4%	4	Feb-15-22

## Insider Activity

- Harness 18 years of the highest-integrity insider data & research.
- Isolate the most meaningful behaviors around 10b5-1, Form 4s, Equity Grants, and more.
- Identify deviations and possible red flags with Research Briefs and Unusual Event alerts.



## Buybacks

- Make sense of the \$10+ trillion repurchased with 15-year history of all buyback initiations, revisions, and quarterly repurchases.
- Stay on top of ASRs, intra-quarter updates, and other timely disclosures
- Analyze buybacks alongside insider buying, CEO/CFO changes and more, for multi-factor idea gen.

#	Insider	Type	Position	Time In Role	Employ. Agren.	Comp./Sec. Details	Effective Date	Pre & Post Stock Chg	Disclosure Date
1	David R. Looney	Resign - Retirement	CFO	4.3 years	-	-	Jun-30-22	+83.8%	Mar-09-22
2	Thomas J. Mirreles	Promotion	CFO (was SVR Technical Services)	3.8 years	-	Yes	Jun-30-22	+83.8%	Mar-09-22
3	Nichelle A. Estley	New Director	Director	-	-	-	Jun-10-21	+52.6%	Jun-10-21
4	Walter M. Mirch	Resign - Retirement	Director	9.8 years	-	-	May-12-21	+96.4%	Mar-26-21

## Management Changes

- Monitor all leadership changes buried in SEC disclosures across 5,000+ companies.
- Streamline due diligence with detailed company histories, timelines, and board compositions.
- Receive customized reports highlighting notable hires and unexpected departures.

InsiderScore
Q3 2021 ATM Trends

### Q3 2021 At-The-Market ("ATM") Offering Trends

Published December 2, 2021

A report examining ATM stock offerings at U.S. companies.

- > **U.S. ATM volume drops -17% QoQ to \$12.1B in Q3'21.** ATM volume at U.S. companies in Q3'21 was \$12.1B, a -16.7% sequential decline though a 17.9% year-over-year increase. After an all-time high of quarterly ATM volume of \$18.0B in Q4'20, overall ATM volume has decreased in three straight quarters. Despite that, Q3'21 volume remains well above that of quarters prior to Q4'20.
- > **Number of companies that sold under ATM programs in-line with prior quarter.** A total of 267 companies utilized ATMs in Q3'21, matching the 267 companies that sold shares pursuant to ATM programs in Q2'21. The record breadth of 305 unique companies was set in Q1'21. The Q3'21 figure is 14.6% higher YoY when 233 companies sold using ATM programs in Q3'20.

## At-The-Market Offerings (ATMs)

- Track the entire ATM lifecycle from initial offering through subsequent stock sales.
- Quickly find companies selling shares through ATMs.
- Investigate selling agents, commission rates, and more.

#	Company	Market Cap	Volume	Change	Value	Change	Volume	Change			
2	AMZN Amazon.com	\$1,494.1B	Com	hide	26	\$7,977.5	2,392.5	+13.5%	+\$977.4	0.5%	3.3%
	Lone Pine Capital				\$2,058.4	617.3	+71.0%	+8877.6	0.1%	8.4%	
	Tiger Global Management				\$1,178.0	353.3	-37.8%	(\$735.0)	0.1%	2.6%	
	Viking Global Investors				\$927.6	278.2	+37.1%	+\$257.9	0.1%	2.7%	
	Coatus Management				\$891.4	267.3	+24.0%	+177.1	0.1%	4.0%	
	D1 Capital Partners, LP				\$849.1	254.7	+16.0%	+120.6	0.1%	5.1%	

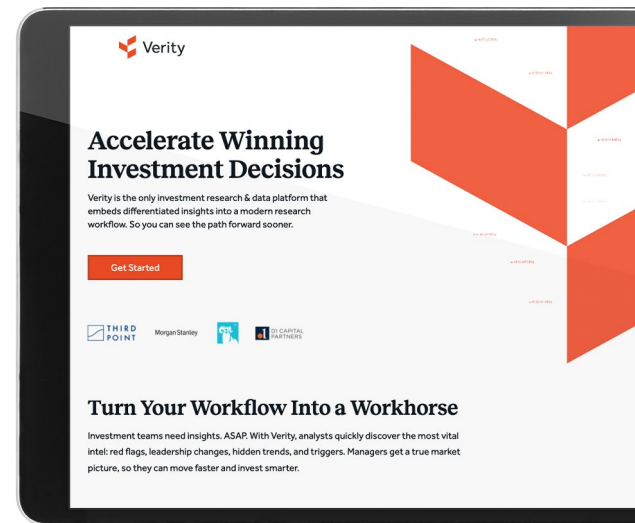
## Institutional Ownership

- Benchmark your fund's holdings against peers.
- Aggregate quarterly buying/selling trends of peers & competitors.
- Screen all 13F activity for advanced concepts like biggest portfolio bet and more.

# See It for Yourself

Discover how VerityData InsiderScore can accelerate idea generation and risk management. Get access to 15+ years of the most accurate and complete data of its kind along with insights from VerityData experts.

Visit [verityplatform.com/get-started](https://verityplatform.com/get-started) to learn more.



## About Verity

Verity is a leading provider of research management software, data and analytics delivered through a comprehensive platform to provide best-in-class workflow, portfolio monitoring, and idea generation solutions to more than 350 institutional investors globally. The platform is the result of a strategic merger between MackeyRMS and InsiderScore, sponsored by Resurgens Technology Partner. Between Mackey's cloud-based research platform and InsiderScore's data and analytics, the merged company delivers a powerful Platform combining data, analytics, and research management software solutions for investment teams conducting fundamental research for actively managed client portfolios. The company is headquartered in Boston, with offices in New York, Princeton, NJ, Seattle, London, and Sydney. For more information, visit [www.verityplatform.com](https://www.verityplatform.com).