

Software in the Tozzi Trading Floor – R0400

Updated August 2016 – Kai Petainen

FactSet <http://www.factset.com/>

FactSet combines data from a number of databases and places into a single information system. The broad data library offers information on financial, market, and economic information, including fundamental data on tens of thousands of companies and securities worldwide. Clients can manipulate and analyze data in an infinite variety of formats, they can create custom reports, perform stock screens through Universal Screening, and even back-test financial variables historically. Factset is a premier software solution for equity and quant research.

Bloomberg <http://www.bloomberg.com/>

“A massive data stream, unparalleled in scope and depth, delivered to your desktop in real time. Along with data, the Bloomberg Professional® provides access to all the news, analytics, communications, charts, liquidity, functionalities and execution services that you need to put knowledge into action. Once you have access to our rich content, you can build a customized View of the markets using Launchpad, our real-time platform for news, security monitors, charting and more.”

Trading Technologies <https://www.tradingtechnologies.com/>

“X_Trader is the front-end execution solution of choice for professional traders. It provides broker-neutral global market access from a single platform. X_TRADER incorporates many proprietary technologies and industry-leading features including MD Trader®, the patented ladder that is the best available tool for point-and-click trading.”

upTick

“upTick is financial-simulation software developed at the Harvard Business School. It enables students to learn fundamental finance concepts through actual decision-making under real world conditions. That is, instead of merely reading about these concepts in a textbook or hearing about them in a lecture, students *participate* in their derivation and *experience* them for themselves using a simulated marketplace that mirrors actual historical events.”

eSignal Pro <http://www.esignal.com/>

eSignal Pro provides access to all major equity, futures and options exchanges, as well as complete news stories, market commentary, exchange leaders, ticker searches, Time and Sales, Nasdaq Level II data, technical data, foreign exchange data, historical data and US Treasury data.

eVal

Created by Russell Lundholm and Richard Sloan, eVal is an Excel VBA program that performs comprehensive financial and valuation analyses. It imports corporate financial data from various sources, conducts ratio and cash flow analyses, and guides the user through the steps of forecasting and valuation by using both residual income and DCF techniques.

Equity Insights (AFGView) <http://www.economicmargin.com/>

“The Applied Finance Group (AFG) helps institutional investment, consulting and corporate firms globally in accurately measuring corporate performance and identifying mispriced equities. AFG developed its proprietary framework, Economic Margin, to correct distortions created by traditional accounting-based analysis. The Economic Margin Framework is more than just a performance metric, as it encompasses a valuation system that explicitly addresses the four main value drivers of enterprise value: profitability, competition, growth, and cost of capital.”

Barra Portfolio Manager <https://www.msci.com/risk-performance>

The BARRA Aegis System is an industry-leading equity risk management software package that enables portfolio managers, analysts, researchers and traders to achieve a competitive edge in managing equity securities and derivatives. Its Portfolio Manager can help construct and optimize equity portfolios, while factoring in risk, return, and transaction costs.

PANARAY <http://www.williamoneil.com/data-services/panaray/default.aspx>

PANARAY streamlines the equity research process by creating the Datagraph™, which efficiently positions fundamental data together with critical market timing information in a single, easy to use view. The database tracks 70,000 stocks and funds in more than 70 countries – with 130 years of stock trend, performance, and market cycle information. It is vetted by over 40 research specialists and analysts, who work daily to ensure the data is normalized to produce timely, accurate support for their buy and sell recommendations and portfolio management advice.

