

RECOGNIZE OPPORTUNITY. REALIZE PROFIT.



Strategy Builder™

Empower Account-Holders

Recognia Strategy Builder™ is a powerful application developed for self-directed investors to build investing strategies and screen for investment opportunities based on both fundamental and technical analysis. These investment strategies include multi-factor investment models which can be chosen from a pre-built library or created by the investor. Back-test capabilities allow strategies to be tested using up to five years of historical stock market data. Strategy Builder provides compelling content to boost investor confidence and drive trading volume, while enhancing loyalty amongst your account-holders.



Enable your investors to quickly and confidently identify stocks which meet their investing objectives by using our easy-to-use graphical interface. Investors will easily create and customize their investment strategies using multi-factor investment models which can be chosen from a pre-built library or may be created by the account-holder.

Boost Account-Holder Confidence with Backtesting

Once an investor has developed an investment model, they can test the historical performance of the model using the backtesting feature. Backtesting evaluates the results of the chosen investment models against up to five years of historical stock market data. The investor will be able to quickly evaluate whether their strategy can “beat the market”. Backtesting results are shown numerically, as well as graphically and can be plotted against a market index. Subsequent revisions to the model can also be plotted so that the investor can determine if the changes made improve or worsen the historical performance.

Test-drive our solution today: <https://testdrive.recognia.com>

Strategy Builder can screen against a list of over 35 fundamental criteria (P/E ratio, dividend yield, market cap, etc.) as well as over 25 Technical Event® types (classic or short-term patterns, indicators and oscillators) and will provide alerts on changes in the top results of investors selected screens, providing actionable trading ideas.

The screenshot displays the Strategy Builder interface. The top section, titled "Selection Criteria", shows a table with columns for "Min", "Max", "Matches", and "Delete". Three criteria are listed:

Criteria	Min	Max	Matches	Delete
EPS Growth (Projected This Year vs. Last Year)	15%	max	1039	X
Bullish Short-term Patterns	2	5	8390	X
Sector & Industry	Finance		1268	X

Buttons at the bottom of this section include "Hide Criteria", "Start Over", "Refresh Results", and "Save Screen". A "Total: 21" is shown at the bottom right.

The bottom section, titled "Show Criteria", features a search bar and a list of categories on the left: Popular, Analysts, Company Basics, Debt, Dividends, Growth and Earnings, Performance, Profitability, Technicals, Trading, and Valuation. The "Profitability" category is selected, showing a list of metrics including Operating Margin (TTM), EBITD Margin (TTM), Gross Margin (TTM), Return on Equity (TTM), Return on Investment (TTM), Return on Sales (TTM), Return on Assets (TTM), Return on Capital (TTM), and Revenue Per Employee. The "Gross Margin (TTM)" metric is highlighted, and a detailed description is shown on the right:

Gross Margin (TTM)
Tells Me: profitability of business activity
 Add
 Measures the percent of revenue left after paying all direct production expenses. It is calculated as annual total revenue minus annual cost of goods sold, divided by annual Total Revenue.

“Our strategic decision to work with Recognia is based on the value of the products they have today, and the roadmap the organization has for the next 18 months. Their powerful technical pattern recognition tools and advanced stock filters, enhance Lightspeed’s offering and help traders make better trading decisions. This will play an increasingly important role as we look to expand into new asset classes and geographies.”

Stephen Erlich
 CEO,
 Lightspeed Financial

Guide Account-Holders Toward Tailored Trade Ideas

Strategy Builder provides a guided experience to investors to help build confidence in building investing strategies and screening the markets for well suited investment ideas. Your account-holders receive instant value from pre-authored investment models with clearly written explanations of their strategies. While working with a model your account-holders will receive quick access to practical criteria definitions, pre-populated real-world value ranges and typical number of matches—along with performance results from backtesting different versions of the model. It’s never been this easy to develop an investing strategy for personally relevant investment ideas.

About Recognia

Recognia is the worldwide leader in quantitative and technical analysis. Our actionable technical, fundamental and value-based analytics help retail online brokers to monetize their investor accounts and institutional professionals to optimize their trading strategies. Recognia research helps validate investment decisions, manage risk and find trade ideas. It provides coverage on more than 85 exchanges worldwide including stocks, options, ETFs, forex, indices, and futures. With more than 20 million provisioned accounts, Recognia products service the largest and most successful firms and institutions around the globe including: Bloomberg, Fidelity, Charles Schwab, Merrill Edge (Bank of America), Kotak Securities, TD Waterhouse, and NCB Capital to name a few.



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