Quick Reference Guide

This Quick Reference Guide is designed to be just that: a quick place to find best practices for features that will help you customize your Manzama Insights account. Can't find what you're looking for here? Contact us via email or by phone.

Email Support:
support@manzama.com
(response within the same business day.)

Phone Support:
Australia: +61 02 8417 2339 - Hours: 8:30-17:30 AEST
UK and Europe: +44 (0)203 282 1633 - Hours: 8:30-17:30 BST
United States: 541.706.9393 - Hours: 8:30-5:30 PDT

Manzama Insights Log-In and Main Dashboard

Logging in will take you to your main dashboard page, showing you companies you are currently tracking that have recent health score changes. To see all companies you are tracking, click on "view all of my companies."

Search for Companies or Industries

To search for a company or industry, click the Companies or Industries navigation tab in the upper left of the screen.

To search for a company, click the Show All Companies option and then enter the name of the company in the Filter field. To search for an Industry, navigate through the list of available industries or enter a name in the Filter field.
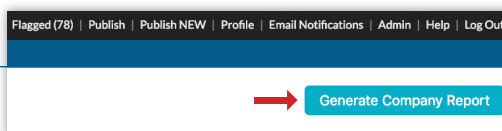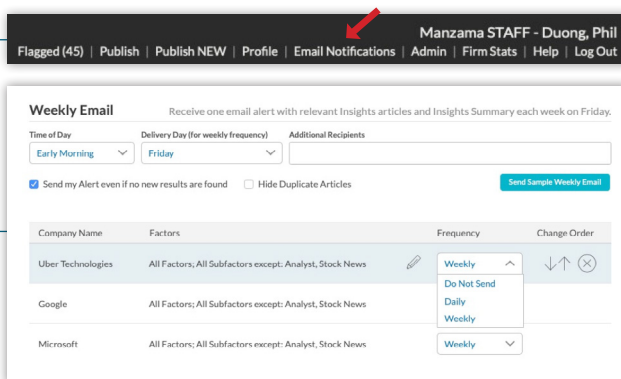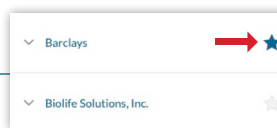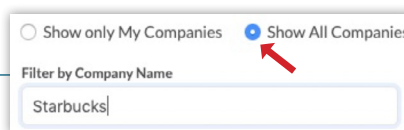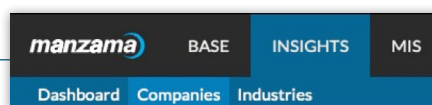
Saving Companies or Industries

Manzama Insights automatically monitors the companies or industries you may have already added to Manzama Base if they are Insights enabled*. To save additional companies or industries to your profile, simply click the star icon next to the name.

Email Notifications

Manzama Insights provides a daily or weekly email with top events and health analytics for companies and industries you are monitoring. The default email frequency is weekly. To customize the frequency and factors/sub-factors monitored, click on Email Notifications on the top navigation bar, and then select the Insights Email Alerts Settings tab.

Generate Company or Industry Report

Insights provides a company or industry report covering the last 30 days. This report provides health analytics and major events for each major health factor. To generate a report, click the Generate Report button in the upper right-hand side of the Company or Industry Overview pages.
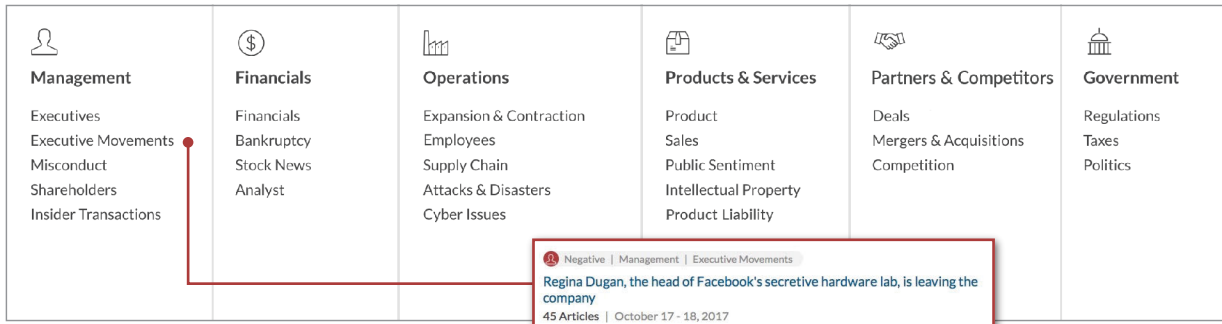
*Insights enabled companies and industries are those that are currently being analyzed by Insights. Not all companies and industries covered within Base are enabled within Insights. If you are unable to find a company or industry that you would like to monitor, please reach out to support@manzama.com.

How Manzama Insights Works

## 1 Intelligent Article Classification & De-Duplication

Insights' data analytics and machine learning reviews each article about companies and industries, ignores the irrelevant or repetitive articles and focuses only on the material stories affecting companies and industries. Each story is classified by 6 Factors and 25 Subfactors, and whether they positively or negatively impact the company or industry.

Management	Financials	Operations	Products & Services	Partners & Competitors	Government
Executives	Financials	Expansion & Contraction	Product	Deals	Regulations
Executive Movements	Bankruptcy	Employees	Sales	Mergers & Acquisitions	Taxes
Misconduct	Stock News	Supply Chain	Public Sentiment	Competition	Politics
Shareholders	Analyst	Attacks & Disasters	Intellectual Property		
Insider Transactions		Cyber Issues	Product Liability		

Negative | Management | Executive Movements
Regina Dugan, the head of Facebook's secretive hardware lab, is leaving the company
45 Articles | October 17 - 18, 2017

2 Corporate Health Score

Analyzing all of the filtered articles, Insights creates a Health Score for each company overall, and also within each of its Factors and Subfactors. This quickly tells you who's doing well, who's not, and where a company is facing risk or opportunity.

-5 HEALTH SCORE

-10 MANAGEMENT HEALTH
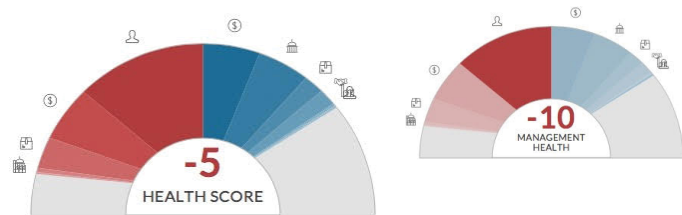
3 Health Trends

A company's Health Score can be measured over time and compared against individual Health Factors by factor or category.

Health Score Trend

● Google Health Score   ● Products & Services Health Score
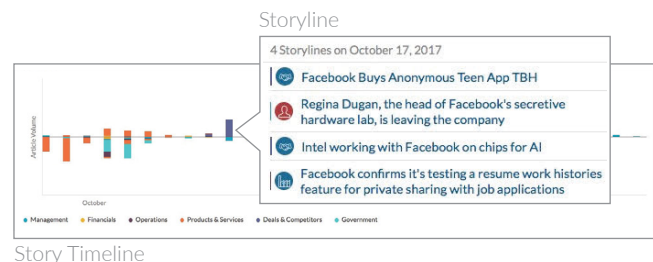
4 Industry Matrix

Each company's Health Score can be plotted on an industry matrix, giving you a quick view of who's healthy and who's at risk. The Industry matrix gives you a roll-up of all the companies within an industry sector and notifies you which companies are facing risks or opportunities, and in what areas.

Smaller, Healthier   Larger, Healthier

Smaller, At Risk   Larger, At Risk
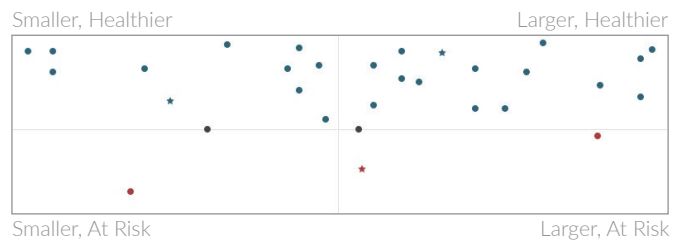
5 Storylines & Story Timeline

Insights clusters articles to create distinct Storylines. Storylines are then plotted to timelines showing article volume, what's positively or negatively impacting a company or industry, and how the Storylines have progressed and changed over time. The Story Timeline quickly identifies trends and anomalies, which gets you to the heart of risks and opportunities.

Storyline

4 Storylines on October 17, 2017
- Facebook Buys Anonymous Teen App TBH
- Regina Dugan, the head of Facebook's secretive hardware lab, is leaving the company
- Intel working with Facebook on chips for AI
- Facebook confirms it's testing a resume work histories feature for private sharing with job applications

● Management   ● Financials   ● Operations   ● Products & Services   ● Deals & Competitors   ● Government

Story Timeline

What's behind the Insights Health Score

Insights mines the sea of social media and internet data, looking for news about your companies and your industries. Using data analytics and machine learning, Insights filters out the noise and focuses only on articles that impact industry or corporate health. Each articles is classified across 6 Factors and 25 Subfactors. Finally, articles are classified for their valence: whether this positively or negatively impact corporate health.

With this level of data analysis, Insights can quickly tell you: How is this company or industry doing? Is it healthy or at risk? And more importantly, across 25 Subfactors, in which area is the company or industry struggling or excelling? Insights makes it possible to track health scores over time, across multiple companies and industries and better predict future trends, risks, and opportunities.

GOVERNMENT

MANAGEMENT

FINANCIALS

COMPANY HEALTH

PRODUCTS & SERVICES

OPERATIONS

PARTNERS & COMPETITORS

Management
How healthy is the management team?

Subfactors: Executives, Executive Movements, Misconduct, Shareholders, Insider Transactions

Product & Services
How healthy are the revenue sources?

Subfactors: Product, Sales, Public Sentiment, Intellectual Property, Product Liability

Operations
How healthy are the structures that create and deliver products and services?

Subfactors: Attacks & Disasters, Cyber Issues, Expansion & Contraction, Employees, Supply Chain

Financials
How healthy are the overall finances?

Subfactors: Financials, Bankruptcy, Stock News, Analyst

Partners & Competitors
How healthy are relationships with peer companies, friendly or otherwise?

Subfactors: Deals, Mergers & Acquisitions, Competition

Government
How healthy are relationships with government entities?

Subfactors: Regulations, Taxes, Politics

Manzama Insights™ FAQ

What is Manzama Insights™?
Insights is a system developed by Manzama using data analytics and machine learning to analyze company news for indications and forecasts of corporate and industry health.

What is a Health Score?
Each article is classified across 6 Factors and 25 Subfactors of corporate health. Additionally, articles are classified for their valence: whether this positively or negatively impacts corporate health. Using these values, Insights calculates an overall Heath Score, as well as granular a Health Score for each Factor and Subfactor.

What do Factors and Subfactors represent?
Insights focuses on two central questions: 1) How to identify and organize news that may significantly impact the health and future prospects of a company or industry? And 2) How to determine the direction of impact of the news, its valence, does it positively or negatively impact the company or industry?

There are 6 Factors that represents Insights' data organizational structure and philosophy. **1) Management:** How healthy is the management team? **2) Products & Services:** How healthy are the revenue sources that supports the company? **3) Operations:** How healthy are the structures that create and deliver the product and services (and creates the revenue stream)? **4) Financials:** How healthy are the overall finances of the company? **5) Partners & Competitors:** How healthy are its relationships with peer companies, friendly or otherwise? **6) Government:** How healthy are its relationships with government entities?

Factors are further divided into 25 more granular Subfactors. For instance, Operations is subdivided into Labor, Expansion & Contractions, Supply Chain, Attacks & Disasters, and Cyber Issues.

Where is the data coming from?
Insights leverages and analyzes data from Manzama's library of over 70,000 legal and business news and social media sources.

What is an insight on an article?
When Insights identifies a story that impacts corporate health, Insights will display an "insight" next to the article indicating which Factor, Subfactor, and valence it has identified. This "insight" alerts you to potentially impactful stories that may warrant your attention.

What is valence?
• Valence is the identification of whether something is good or bad as it relates to the subject. For Insights, valence measures whether a story positively or negatively impacts the company, Factor, or Subfactor.
• If valence cannot be determined, it is classified as neutral.
• Valence is different from "sentiment". Sentiment concerns a person's opinion or feelings on the subject. Valence on the other hand is an objective and factual identification of positive or negative impact on the subject. For instance, "I hate Apple products" is an expression of a negative sentiment about Apple. "Apple sales fall in Q2" is a factual event related to Apple and is one that represents a negative valence or negative impact on Apple.

What is a Story?
A Story is a group of articles about a company on a given day that fall into the same Health Subfactor and valence.

What is a Storyline?
A Storyline is a group of Stories over days, weeks, or months that all concern the evolution of a particular topic within a Health Subfactor.

What is a Related Storyline?
A Storyline might be discussed from the perspective of different Subfactors. Related Storylines allow you to see those and get a full perspective on what's happening.