

ZRS 5.0 CUSTOMIZATION FEATURES

WHAT YOU WANT TO SEE - HOW YOU LIKE TO SEE IT

If you are like many equity portfolio managers using ZRS, your success has been based on your unique investment process. Does your existing market data system display the information you want to see, the way you want to see it? ZRS can match your system to your process.

CUSTOM HOME PAGE- Your custom home page can consist of 1 to 4 windows, each displaying any of the 16 ZRS modules. This enables you to monitor portfolios using 15 minute delayed prices in one window, while you display your custom valuation charts in another window. This is just one example of the countless combinations you can create in ZRS.



Customizable Home View

PEER GROUPS- When using financial ratios to select one company from a peer group, it is critically important which companies are included in this group. ZRS enables you to easily define peer groups and quickly identify those companies whose key financial ratios are deviating in the correct direction from others in the peer group.

CUSTOM INDUSTRY DEFINITIONS- If your firm's investment process is based on a custom set of industry or sector definitions, ZRS can incorporate your industry definitions into all displays in the ZRS system. You can organize internal and client reports by your own industry groups, create and chart aggregates of financial ratios for your own industries or sectors, and use the aggregates in screening and in reports.

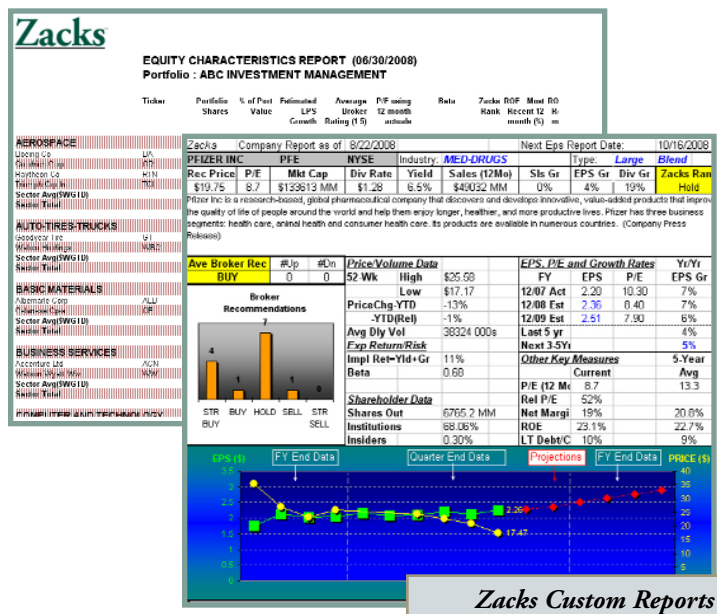
CUSTOM CHARTS- You can define any chart you find useful and then the chart will appear when you right click on any chart window in ZRS.

CUSTOM VALUATION METRICS- Up to 4 user-defined calculated ratios can be displayed under the Custom Valuation heading of the default Top View page. Your custom valuation metrics can vary by industry so, for example, you can use one valuation ratio when you are evaluating a financial company and another when evaluating a retailer.

INTEGRATE IN-HOUSE MODELS- If you create or purchase composite indicators they can be imported into the ZRS system and included in the various ZRS displays.

CLIENT PORTFOLIOS IN ZRS- ZRS is integrated with the AXYS portfolio accounting system, so buy-side firms who use AXYS can automatically view their client portfolios in many of the ZRS modules, including Performance Attribution and Portfolio Reviews. If your firm does not use AXYS, the ZRS IT team can develop an interface between ZRS and your portfolio accounting system.

GUIDANCE LIST REPORT IN ZRS- If you are using another system to create your daily or weekly Guidance List or Followed List report, the output from the other system can be displayed in ZRS. As you become familiar with ZRS you may find it easier, in fact, to use ZRS to produce this required report directly and rely on only the ZRS system for all of your market data needs.



Zacks Custom Reports