



Fund reviews and investor services

Edison offers a range of public & confidential investor services, working closely with the investor to define a scope appropriate to their requirements. Target: Quoted and private - PE, VC, VCT and Family Office investors

We can offer a review of portfolio companies on behalf of an investor, including a high level performance review examining historic performance.

We also offer the ability to “deep dive” into the portfolio, offering “private company reporting” on key investments, either for management, LPs or for external publication as appropriate. And with the support of management, we can develop and publish forecasts for the underlying assets.

Fund review

- Providing a 3rd party performance review, examining the track record of the fund and management team to support the fund raising process.

Portfolio “deep dive”

- Working with public market investors as well as PE, VC and VCTs to educate the market on specific assets, providing visibility and insight as well as potentially putting valuations and forecasts in the market.

Private company reporting

- For private funds, providing ongoing research and forecasts for stakeholders and LPs on a limited or confidential basis, to offer transparency and develop public market discipline in the management.

The collage displays several research reports and dashboards from Edison. Key elements include:

- Powerhouse Ventures:** A report titled 'Power to the people' with a 'Market/CIT profile view' and 'Investment complete' status.
- GLI Finance:** A report titled 'The IPO valuation' for an 'Alternative finance company' with a 'Corporate outlook' and 'Financial forecast'.
- YFM Equity Partners:** A report titled 'Appraisal of investment performance' for a 'Private equity co-investment opportunity'.
- Imperial Innovations:** A report titled 'Doing deeper into the portfolio' with a 'Market/CIT profile view' and 'Investment complete' status.
- NetScientific:** A report titled 'Translating healthcare technologies' with a 'Portfolio overview' and 'Healthcare equipment & services' focus.
- Maven Capital Partners:** A report titled 'Appraisal of investment performance' for a 'Private equity co-investment opportunity'.
- Engingeneering:** A report titled 'Edison Investment for Eding' with a 'Market/CIT profile view' and 'Investment complete' status.
- ICF Digital:** A report titled 'Edison Investment for Eding' with a 'Market/CIT profile view' and 'Investment complete' status.
- Valuation:** A report titled 'Uplift potential supports M&A premium' with a 'Market/CIT profile view' and 'Investment complete' status.

Edison Investment Research Limited is authorised and regulated by the Financial Conduct Authority



Why Edison?

With the breadth of its coverage universe, Edison is ideally qualified to analyse and assess a wide range of companies at different stages of the growth curve.



Edison is not influenced by a success-based fee structure. Instead, we provide an honest, independent review. Our review can be private, to inform management and stakeholders, or public to highlight the strength of the investment case to a wide investor universe.



Edison’s USP resides in its 80+ equity analysts across 10 sectors – sector experts with decades of experience. Additionally, Edison has a network of consultants and subject matter experts where even deeper specialism is required.



With a range of solutions for different investors, public and private, we would be delighted to discuss how we might tailor a solution to meet your requirements.

Edison Services Overview

Our services



Consulting includes working with clients on transactions and fund-raising projects, valuations, commercial due diligence, pre-IPO work, modelling, market reports and other ad-hoc projects.



Pre-IPO Research can help you prepare your board for life as a public company by telling your story to the market.



Equity Research ensures that investors are kept regularly informed on our client companies throughout the year.



Enhanced Distribution supplements the existing Edison distribution circuits with paid for newswire services that creates greater reach and engagement for our clients.



ResearchLink allows clients to embed our research on their company website improving investor engagement



InvestorTrack® is Edison's unique platform tracking the readership of published research.



ADR Research directly targets US investors and our research has a proven track record in stimulating liquidity in ADRs and attracting new investors from the largest pool of capital in the world.



Boardroom Briefing is an honest, concise and independent view of various equity market themes and trends specific to a client's sector and business.



Investor Relations is a full service investor relations business that works with private and public companies, custom-building programmes of activity and accessing diverse pools of investment capital through its global investor networks.



Perception Surveys deliver the investor intelligence needed to help manage market expectations for the client's board of directors.



Targeted Investor Marketing enables your company and our covering analysts to work together to identify 25 key funds to target as potential investors.



EdisonTV executive interviews are a natural extension of providing investors with an update on the client company via social media.

Frankfurt

London

New York

Sydney

Wellington

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