



INDEPENDENT'S DAY *New York*

The Fourth Annual Independent Research Conference

April 7, 2008 • New York City • Grand Hyatt

Agenda

8:00 a.m. **Registration and Breakfast**

8:30 a.m. **Opening Remarks**

Stanton Green, Chairman, Investorside

8:45 a.m. Dagen McDowell, Anchor, Fox Business Network

9:20 a.m. **Roundtable: Building the Mosaic using Independent and Alternative Research**

Richard Leggett, Head of Governance Business, RiskMetrics Group

Nicholas Colas, Director of Research, BNY ConvergEX Group LLC

Greg DeSalvo, Vice President, Goldman Sachs Investment Management Division

John Wiseman, Director, FactSet Research Systems, Inc.

Moderator: Michael Mayhew, Integrity Research Associates, LLC

10:00 a.m. **Concurrent Panel Discussions**

Expert Networks

Kevin Coleman, CEO & President, Coleman Research Group, Inc.

Daniel Palestrant, CEO, Sermo, Inc.

Anne Maffei, CEO and President, Vista Research

Stephen G. Abraham, SVP Global Head of New Markets, Reuters Insight

Moderator: Bruce Fador, Senior Vice President, TheStreet.com

Research Management

Mark Rice, CEO, Tamale Software, Inc.

Tim Gavin, CEO, Code: Red Inc.

Dan Dykens, CEO, Norbury

Michael Rose, SVP Product Development, Gerson Lehrman Group

Moderator: David Quirk, Managing Consultant, Citisoft, Inc.

10:50 a.m. **Break**

11:00 a.m. **Case Study: Presentation One**

Battle Road Research, Ltd

Behind the Numbers

CreditSights, Inc.

Disclosure Insights

Ned Davis Research, Inc.

RiskMetrics Group

11:40 a.m. **Breakout Session I: Concurrent Sessions with**

AC Nielsen Financial Services

Atlantis Investment Co. Inc.

BNY ConvergEX Group, LLC

Connotate Technologies, Inc.

Farmhouse Equity Research

OTR Global

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RESEARCH ASSOCIATION

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A Goldman Sachs Business



12:05 p.m. **Breakout Session II: Concurrent Sessions with**

Argus Research Group	Majestic Research
Coleman Research Group	KnowledgeBid, Inc
Graident Analytics	Standpoint Research, Inc.
iSuppli	

12:30 p.m. **Breakout Session III: Concurrent Sessions with**

Asset4	Medley Global Advisors
CPMS Computerized Portfolio Management Services, Inc.	New Constructs, LLC
Integrity Research Associates LLC	Quantitative Services Group LLC
	ValueEngine Market Neutral

1:00 p.m. **Lunch**

Introduction by Tom Conigliaro, Hudson Street

Guest Speakers:

Larry Tabb, CEO and Founder, Tabb Group

Jonathan Glick, Director of Research Operations, Gerson Lehrman Group

2:40 p.m. **Concurrent Panel Discussions**

Regulatory Environment

Lee Pickard, Pickard and Djinis LLP

Patrick M. Joyce, Special Counsel, SEC

Gerald T. Lins, General Counsel, ING Investment Management Americas

Moderator: John Meserve, Executive Managing Director, BNY ConvergeEX Group

Data Mining

Penny Herscher, CEO FirstRain

Brennan Carley, CEO Monitor110

Bruce Molloy, CEO Connotate Technologies, Inc.

Moderator: Charlie Frumberg, CEO Emancipation Capital

3:40 p.m. **Breakout Session IV: Concurrent Sessions with**

FactSet Research Systems, Inc.	Management CV, Inc.
FirstRain	McLean Capital
Greenwich Consultants	Trim Tabs Investment Research

4:05 p.m. **Case Study: Presentation Two**

Battle Road Research Ltd

Behind the Numbers

CreditSights, Inc.

Lombard Street Research Ltd

Ned Davis Research, Inc.

RiskMetrics Group

4:45 p.m. **Wrap-Up and Closing Remarks**



Participating Research Providers

Research Firm	Methodology
AC Nielsen Financial Services	Specialized: Market Research
Argus Research Group	Fundamental: General
Asset4	Specialized: ESG - Environmental, Social, Governance
Atlantis Investment Co, Inc	Fundamental: Sector Specialist
Battle Road Research Ltd	Fundamental: Sector Specialist
Behind the Numbers	Specialized: Forensic
Code:Red Inc.	Specialized: Research Management System
Coleman Research Group, Inc.	Primary: Expert Network
Connotate Technologies, Inc.	Primary: Search-Based
CPMS Computerized Portfolio Management Services, Inc.	Quantitative
CreditSights, Inc	Fundamental: Credit Analysis
Disclosure Insights	Specialized: Regulatory Analysis
Farmhouse Equity Research	Primary: Channel Checking
FirstRain	Primary: Search-Based
Gradient Analytics	Quantitative: General
Greenwich Consultants	Fundamental: Sector Specialist
Investars	Research Management System
iSuppli	Specialized: Industry Experts
KnowledgeBid, Inc.	Expert Network Provider
Lombard Street Research Ltd	Economic: General
Lusight Research	Primary: General
Majestic Research	Primary: Data Mining
Management CV, Inc.	Quantitative and Specialty Qualitative
McLean Capital	Quantitative: Cash Flow
Medley Global Advisors	Economic: Government/Legislative Analysis
Monitor110	Primary: Search-Based
Ned Davis Research Inc	Economic: General
New Constructs, LLC	Specialized: Forensic
Norbury	Specialized: Research Management System
OTR Global	Primary: Channel Checking
Quantitative Services Group LLC	Quantitative General



RiskMetrics Group

Multiple Methodologies: Risk Management, Corporate Governance, Financial Research/Analysis

Sermo, Inc.

Primary: Expert Network

Standpoint Research, Inc.

Quantitative General

Tamale Software, Inc.

Specialized: Research Management System

Trading Central

Technical Analysis

Trim Tabs Investment Research

Economic: Capital Flows

ValuEngine Market Neutral

Quantitative: General

Vista Research

Primary: Expert Network

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