



Epiphany Equity Research

Partners in Performance

Providing the professional investment community the research tools and consulting services needed to build a successful business for over 15 Years.

“This is the best research you aren’t reading”

Tom Thornton, Equity Trader NY, NY

New York , N Y

Tampa, FL

Tokyo, JPN

Table of Contents

What we can do



Epiphany Equity Research

Partners in Performance

Section I) Epiphany Services Consulting & Customization

Section II) Epiphany Reports and Products

Section III) Meet Epiphany's Management Team

Keeping Clients Engaged
Value Added Services
Providing Support



Webinars & Conference Calls

- Weekly live conference call discussing themes, concepts, market, Q&A
- Webinars to educate and inform your firm's employees of changing market trends and updates to existing market themes.
- Surprise your clients by offering a level of service and contact they can't get elsewhere. By inviting your clients to attend webinars that will discuss investment themes, macro market data, and general trends, they will gain a greater interest and understanding of the value you provide.
 - ◆ Index and Sector Trends
 - ◆ Portfolio Composition
 - ◆ Sector Rotation
 - ◆ Technical take and Price Structure

What's important to you

Value Added Services

Providing Support



Customized Reports

Epiphany will provide you with reviews and research specific to sectors and individual names you have an interest in.

- Daily analysis of your portfolio positions
- Custom screens
 - ◆ Provide screening of fundamental based portfolio for technical changes
 - ◆ Provide fundamental look at technically based positions
- Custom reports
 - ◆ Individual Sectors
 - ◆ Sub-sectors within Sectors
 - ◆ Commodities and ETF's
 - ◆ Trading strategies



Client Education
Value Added Services
Providing Support



Monthly Newsletters

At the end of each month Epiphany will provide a recap of the market's performance. This report can be used as a point of contact with clients as well as firm employees. This newsletter will help clients understand the trends that impacted performance for the month.

- Recap and highlight the month's key market points
- Allows your firm an opportunity to stay in touch with clients
- Provide a value added to your client base to evidence your commitment to them
- Educate clients to the resources you employ to ensure their money is being managed wisely.
- Use as a marketing device to acquire new clients
- A recap of in house personnel to provide a better understanding of developing trends and keep them informed

Be Big
Customization

We do the work, you get the credit

White Label Products

All of Epiphany Research's products are available in a white label version. We will customize each offering with your firms logo contact information and design. Imagine having your own in house research team without the hassle and cost.

- **Stay in touch with your customer base**
- **Let your clients know what's happening**
- **Market to new customers**

Daily Look

Daily Market Commentary

Insightful analysis



Epiphany Daily Look

- Insightful commentary providing professionals traders an additional perspective and support in the decision-making process. Analysis of the overall market conditions to help design winning trades.
- Three part daily report featuring:
 - **Part 1**
Analysis of recent action and developments
Assessment and projection of the implications on future action
 - **Part 2**
Drill down with in depth review of specific market/sector attributes
Negative breadth divergences
Oversold buy and sell signals
Proprietary indicators identify buy and sell inflection points for stocks
Inter-market analysis - oil/rates, bond/stocks, gold/dollar, CRB/bond
 - **Part 3**
Market statistical overview
Sector comparatives
Relative Strength performance trends
Percentage of stocks over 10/40/200 day moving averages
S&P breadth changes



Isolations

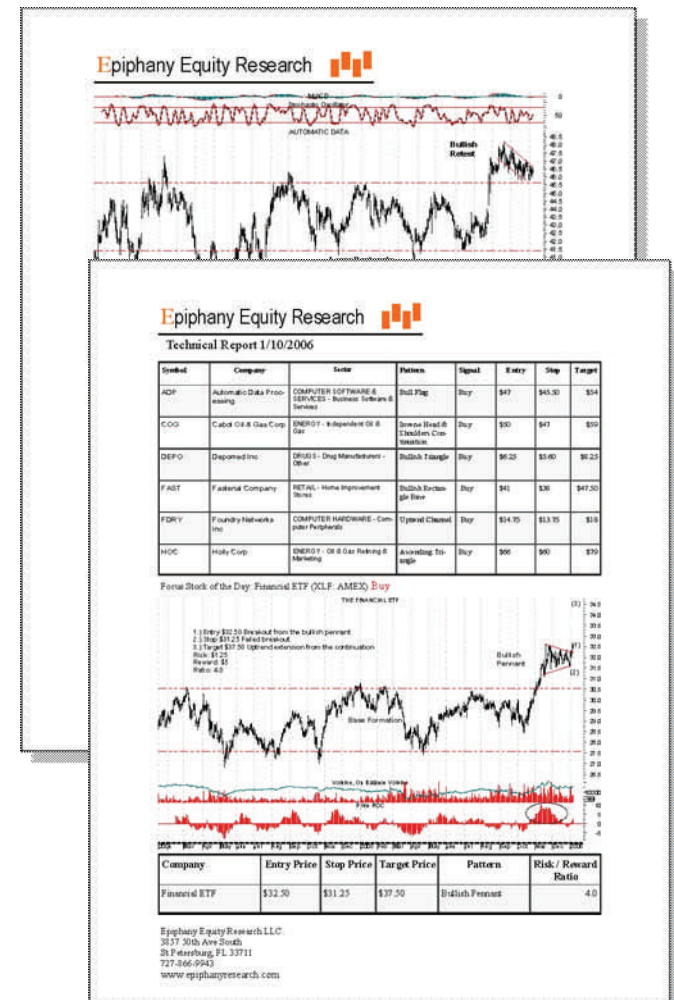
Daily Equity Screening

Finding opportunity



Epiphany Isolations

- Identifying potential bullish or bearish trades bringing together critical technical analysis with fundamentals and assisting in trade timing.
 - Top down generated actionable stock trades
 - Snapshot of stocks exhibiting bullish/bearish configurations
 - All stocks selected have an entry, exit and targets identified to provide a clear price framework for each investment idea.



Internals Data Liquidity Analysis

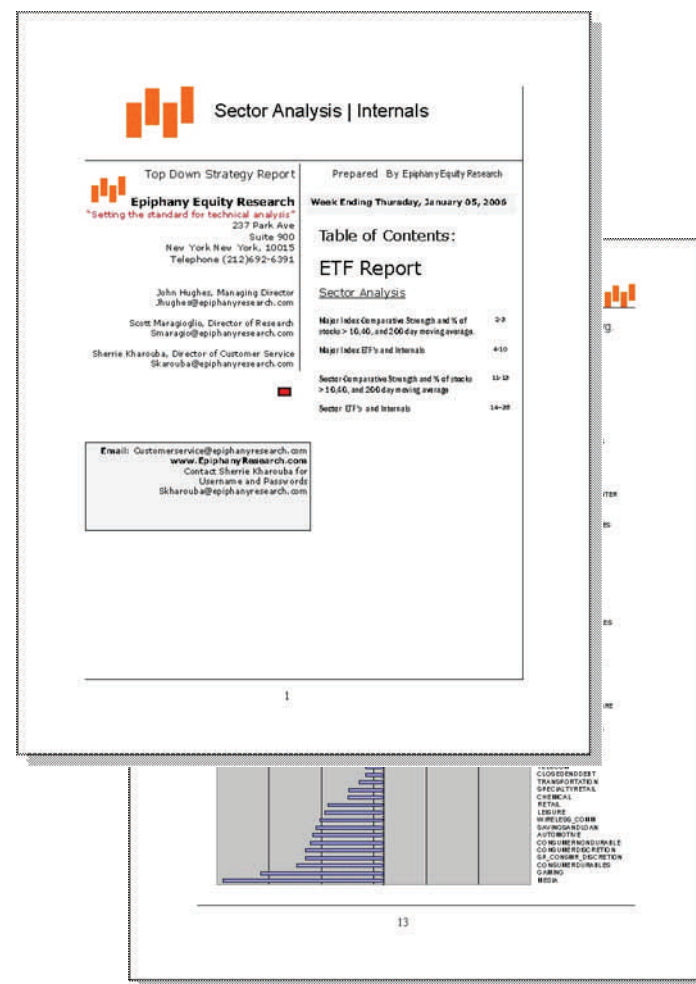
Tracking the money



Epiphany Sector Internals

Epiphany believes that liquidity is the lifeblood of the market. Epiphany's sector internals report assists investment professionals follow the money and put their portfolios in the path of opportunity. Epiphany breaks out proprietary indicators and internals data for over 75 sector groupings. This report allows traders an "inside out" view of market trends and provides invaluable insight into the markets health.

- Exhaustive analysis based on proprietary internal data
- Internal data breakout for 75 index and sector groupings
 - Breadth
 - Net Highs
 - Advance Decline Volume
 - Breadth Internals
- Presented in both data format and with interpretation
- Commentary on important changes



Highlighted Sector
Sector Analysis
What's standing out



Epiphany Sector Report

Each week Epiphany highlights a sector with a developing trend. This report identifies the underlying reasons for improvement or deterioration along with supporting charts and data. This provides you with a detailed overview of a different sector each week.

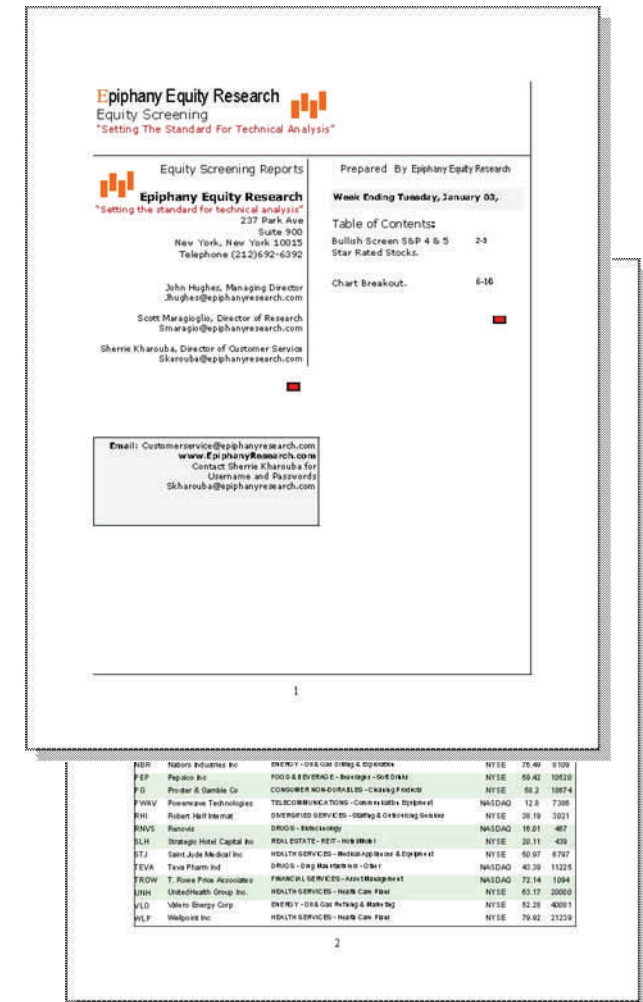
- Comprehensive analysis based on a top down review
- Proprietary data identifies low risk entry points
- Presented in both data format and with interpretation
- Commentary on important changes

Finding trends Equity Screening Managing Risk



Epiphany Equity Screenings

- Provides idea generation by keeping investors alerted to potential shifts. Saves time of sifting through endless charts.
 - Screen multiple universes of stocks for fundamental criteria then overlapping technical's
 - * S&P 4 & 5 rated stocks for bullish technical configurations
 - * IBD 100 stocks for bullish technical configurations
 - * Bullish/bearish cash flow analysis
 - * Stocks with EPS rank of 80 or more
 - Presented in both data format and with interpretation/commentary
 - Friday delivery
- Weekly portfolio review and assessment
 - * Analysis of support, resistance, patterns, potential upside, and internal indicators
 - * Risk Management
 - * Composition
 - * Sector Rotation
- Daily analysis of all portfolio positions
- Custom screens
 - * Provide screening of fundamental based portfolio for technical improvement or deterioration
 - * Provide fundamental look at technically based positions
- Custom reports
 - * Individual Sectors
 - * Commodities and ETF's
 - * Trading strategies



Strength through experience
The Epiphany Research Team
Experience, Knowledge, Conviction

Meet Our Team

Scott Maragioglio

Scott is a co-founder of the firm and serves as the firm's Director of Research. He is responsible for the firm's research content and development of proprietary research tools. Scott has spent 20 years in the field of technical analysis. His programming expertise combined with his research knowledge has made him an innovator in the development of proprietary technical tools and data sets.

John Hughes

John is a co-founder and serves as the firm's managing director overseeing all operations. John has extensive experience and is an active portfolio manager. John has been in the vanguard of developing practical technical analysis tools. His expertise is widely recognized in the professional money management community.

Todd Hawk

Todd joined Epiphany in 2010 and is the firm's director of business development. Todd has over 15 years experience in institutional sales. His knowledge of professional needs with regard to research and other services make him uniquely qualified in ensuring Epiphany's products are current, useful and easily integrated into investment making decisions.