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# Optimize Your Workflow During Earnings Season (Part 3)

## About The Presenter

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**Nicolas Carreras**  
Product Manager, Sentieo

Nicolas Carreras is a Product Manager and Specialist at Sentieo. Nic was previously director of research at Soulor Research, which he founded in 2015. Before that, he held investment analyst roles at United First Partners and at HSBC, prior to which he was an Investment Banker covering technology, media and telecoms at JP Morgan.


## Saving Time During Earnings Season

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- Push vs Pull:
  - Push: Set up text alerts to receive the relevant data that matters to you
  - Push: Template charts
  - Push: Mobile App
  - Pull: Table extraction obtaining KPI data seamlessly
  - Pull: Redline filings
  - Pull: Set up future text alerts
- Create content that's easy to track
- Other

# Key Text Alerts

- Push:
  - Receive emails with key linguistics

☆ Sentieo Search Dige.	"QSR Watchlist" found in 1 new documents today - Your saved search for "QSR Watchlist" found 1 new documents today View in Sentieo Ticker Doc Type Name # Results MCD Company Tr...	Jan 30
☆ Sentieo Search Dige.	"Initiation Research" found in 10 new documents today - Your saved search for "Initiation Research" found 10 new documents today View in Sentieo Ticker Doc Type Name # Results 6862...	Jan 30
☆ Sentieo Search Dige.	"US Restaurants - Total: SSS" found in 1 new documents today - Your saved search for "US Restaurants - Total: SSS" found 1 new documents today View in Sentieo Ticker Doc Type Name ...	Jan 30
☆ Sentieo Search Dige.	"US Tariffs" found in 14 new documents today - Your saved search for "US Tariffs" found 14 new documents today View in Sentieo Ticker Doc Type Name # Results SLGN Company Transcr...	Jan 30
☆ Sentieo Search Dige.	"US Restaurants - Total: SSS" found in 1 new documents today - Your saved search for "US Restaurants - Total: SSS" found 1 new documents today View in Sentieo Ticker Doc Type Name ...	Jan 29
☆ Sentieo Search Dige.	"US Tariffs" found in 11 new documents today - Your saved search for "US Tariffs" found 11 new documents today View in Sentieo Ticker Doc Type Name # Results PCAR Company Transcr...	Jan 29
☆ Sentieo - Alerts	TPX  UBS: First Read: Tempur Sealy International Inc "Highlights From Meeting With ..." - ALERT - New RESEARCH REPORT for \$TPX Tempur Sealy International Inc\$52.65+1.39(2.71%) [0...	Jan 29
☆ Sentieo - Edge	Sentieo Edge: Tuesday Pre-Market News - Tuesday Pre-Market News Pre-market news for the companies you follow on Sentieo. NVDA - Nvidia Corp 138.01 -22.14 (-13.82%) Nvidia is fallin...	Jan 29
☆ Sentieo Search Dige.	"US Restaurants - Total: SSS" found in 1 new documents today - Your saved search for "US Restaurants - Total: SSS" found 1 new documents today View in Sentieo Ticker Doc Type Name ...	Jan 28
☆ Sentieo Search Dige.	"US Tariffs" found in 2 new documents today - Your saved search for "US Tariffs" found 2 new documents today View in Sentieo Ticker Doc Type Name # Results CAT Company Transcript ...	Jan 28
☆ Sentieo - Alerts	CMG  BERNSTEIN: U.S. Restaurants: Grasping the social media brass ring; how accurate are our social-driven comp forecasts? - ALERT - New RESEARCH REPORT for \$CMG Chipotle Me...	Jan 28
☆ Sentieo - Edge	Sentieo Edge: Monday Pre-Market News - Monday Pre-Market News Pre-market news for the companies you follow on Sentieo. PCG - Pg&e Corp 11.77 -2.18 (-15.63%) PG&E Is Just The Fl...	Jan 28
☆ Sentieo - Alerts	JACK: DEF 14A Alert - ALERT - New SEC filing for \$JACK Jack In The Box\$82.74+0.20(0.24%) [09:47 AM EDT] View in Sentieo JACK: DEF 14A Alert Table of Contents UNITED STATES SEC...	Jan 28
	 noname	
☆ Sentieo - Mosaic Ea. 4	Mosaic Earnings Digest - Mosaic Earnings Digest, Part 1 of 4 TickerEarnings Date1M Accel %-ileFQ1 Accel %-ileAdj RsqdHIT Rate eghtJan 29, 2019 (Tuesday)44%33%0.9167%pilJan 29, 20...	Jan 28
☆ Sentieo - Alerts	GOOG  GS: Alphabet Inc. (GOOGL): 4Q18 Preview; UK soft, but strength in Shopping and Mobile should drive solid growth - ALERT - New RESEARCH REPORT for \$GOOG Alphabet Inc\$109...	Jan 27
☆ Sentieo Search Dige.	"Initiation Research" found in 12 new documents today - Your saved search for "Initiation Research" found 12 new documents today View in Sentieo Ticker Doc Type Name # Results 8069...	Jan 25
☆ Sentieo Search Dige.	"US Restaurants - Total: Trade Wars" found in 1 new documents today - Your saved search for "US Restaurants - Total: Trade Wars" found 1 new documents today View in Sentieo Ticker D...	Jan 25

# Key Text Alerts

- Pull:
  - Create linguistic alerts

Load Saved Search <span style="float: right;">×</span>					
Title	Ticker	Query	Date Modified	Email Alerts	Webapp Notification
IAAS Mkt Opp		OR((infrastructure as service...	02-Feb-2019	Daily Digest	<input checked="" type="checkbox"/>
UK Trade War Industrials		trade war	01-Feb-2019	None	<input type="checkbox"/>
Generics CEO Transcript		generics	30-Jan-2019	Daily Digest	<input checked="" type="checkbox"/>
Sentio2019 Picks Organic Growth		OR((organic growth) (price v...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Barrons Top 2019 Organic Growth		OR((organic growth) (price v...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
US Restaurants - Total: Organic Growth		OR((organic growth) (price v...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
US Restaurants - Total: SSS		comparable store sales	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Barrons Top 2019 Wage Inflation		OR("wage" "salary" "wages")...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Sentio2019 Picks Wage Inflation		OR("wage" "salary" "wages")...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
US Restaurants - Total: Change in Targets		OR(increase decrease raise ...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Sentio2019 Picks: Change in Targets		OR(increase decrease raise ...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Barrons Top 2019: Change in Targets		OR(increase decrease raise ...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
US Restaurants - Total: Trade Wars		OR((china tariff) (trade war) (...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Sentio2019 Picks: Trade Wars		OR((china tariff) (trade war) (...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Barrons Top 2019: Trade Wars		OR((china tariff) (trade war) (...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Barrons Top 2019: Increasing Competition		(OR(Loss lose decline) NEA...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
US Restaurants - Total: Increasing Competition		(OR(Loss lose decline) NEA...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Sentio2019 Picks: Increasing Competition		(OR(Loss lose decline) NEA...	22-Jan-2019	Daily Digest	<input type="checkbox"/>
Sentio Top 10 Company EPS Targets		(EPS OR (earnings BEFOR...	18-Jan-2019	Daily Digest	<input type="checkbox"/>
Sentio Top 10 RR EPS Targets		(EPS OR (earnings BEFOR...	18-Jan-2019	Daily Digest	<input type="checkbox"/>

# Template Charts Saving Time

- Push: Your Template Charts

Load Plotter <span style="float: right;">✕</span>									
<input type="text" value="Search Graph by Name"/>	Title ↕	Ticker	URL	Query	Modified ↕	Opened ↕	Owner ↕	Shared With ↕	
Recent	EBIT Growth vs Margin (5)	✓			1/19/2019	2/4/2019	nick.carreras	Long-Term-Capital-Man...	🗑
My Templates	Revenue vs EBIT Margin (2)	✓			1/19/2019	2/4/2019	nick.carreras	Long-Term-Capital-Man...	🗑
Default Templates	Revenue Vs Leverage (1)	✓			1/19/2019	2/4/2019	nick.carreras	Long-Term-Capital-Man...	🗑
Tickers	Sent Spread vs NTM PE vs NTM EPS Growth (8)	✓			1/31/2019	2/2/2019	nick.carreras	Long-Term-Capital-Man...	🗑
Tags	Retained Earnings vs Returns (4)	✓			1/20/2019	2/1/2019	nick.carreras	Long-Term-Capital-Man...	🗑
Shared With Me	EV / (EBITDA-Capex) (10)	✓			1/30/2019	1/30/2019	nick.carreras	Long-Term-Capital-Man...	🗑
Shared By Me	10 Year Gross Margin (11)	✓			1/25/2019	1/25/2019	nick.carreras		🗑
	EBIT Growth vs Capex % Sales (6)	✓			1/19/2019	1/22/2019	nick.carreras	Long-Term-Capital-Man...	🗑
	Historical Margins (3)	✓			1/20/2019	1/20/2019	nick.carreras	Long-Term-Capital-Man...	🗑
	Historical Fwd PE vs Historical NTM EPS Growth (7)	✓			1/19/2019	1/20/2019	nick.carreras	Long-Term-Capital-Man...	🗑

# Template Charts Saving Time

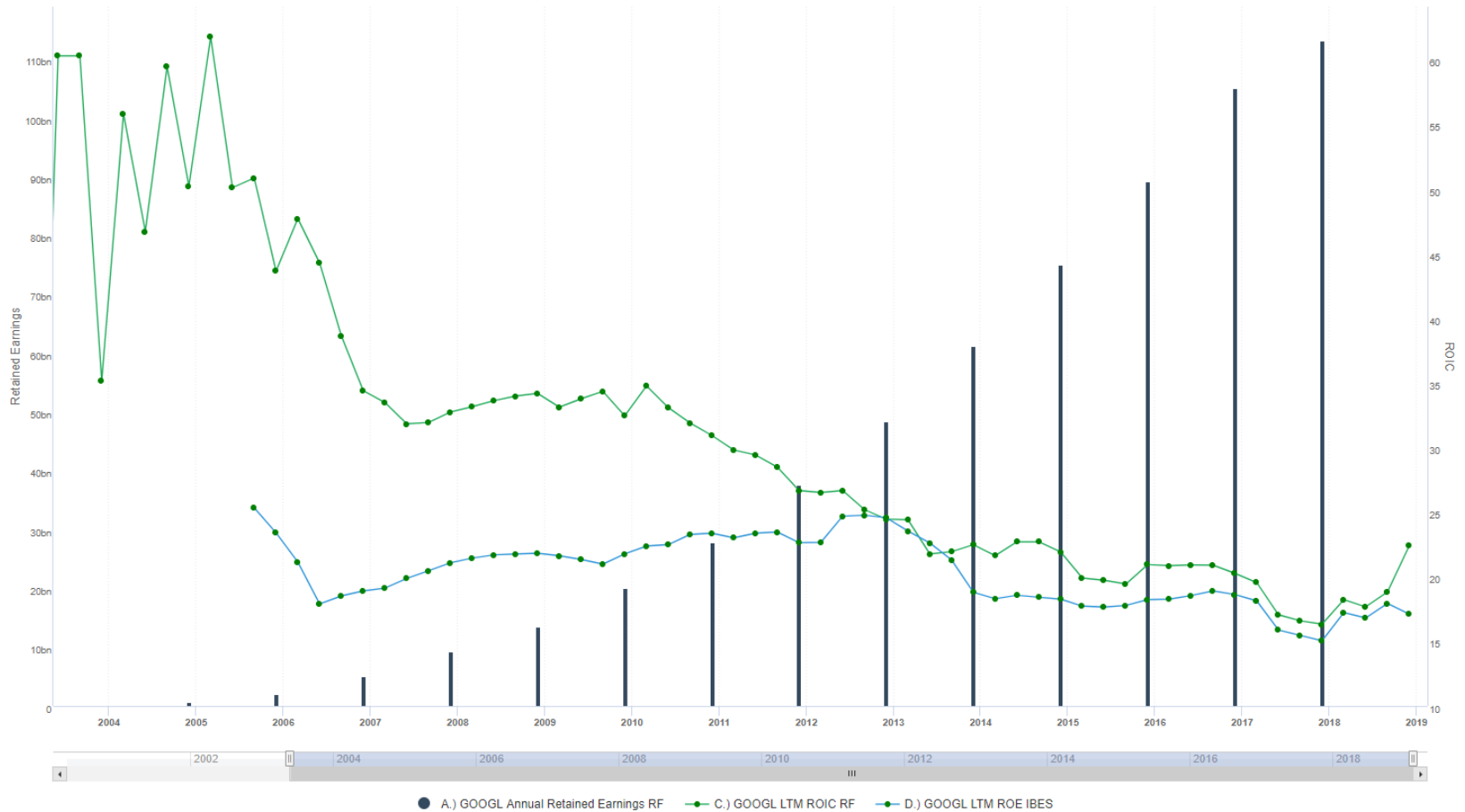
- Pull:

Retained Earnings vs Returns (4) | ☰



Zoom 1m 3m 6m YTD 1y 2y 3y 5y 10y All

From May 26, 2003 To Mar 8, 2019



# Mobile Apps: Mobile Phone

- Push & Pull:
  - Receiving and Searching for data while travelling

The screenshot shows an 'Alerts' screen with a blue header and a navigation bar. The main content area displays several news items, each with a company logo, a title, a brief description, and a 'Fed Rate Changes' tag. The items are:

- AIMT Keyword Match (1)**: RBC: AAAAI abstracts add further efficacy examples to AR101's level of evidence. 5 min ago | Mon 02/04/2019 | 09:49 PM.
- XPO Keyword Match (1)**: STRH: 4Q Recap; Terminal Expansion Driving Above-Peer Performance; Reiterate Buy. 6 min ago | Mon 02/04/2019 | 09:48 PM.
- EFX Keyword Match (8)**: DB: Equifax : Stock Getting Ahead of Fundamentals; Moving to Hold. 6 min ago | Mon 02/04/2019 | 09:48 PM.
- TCFC Keyword Match (3)**: KBW: Growth Rebound, Expense Control Offset the Margin Miss; Adjusting Estimates. 6 min ago | Mon 02/04/2019 | 09:48 PM.
- FCA:IM Keyword Match (6)**: BARC: Fiat Chrysler Automobiles: NAFTA carries the load.

The screenshot shows a search results screen for 'AIR:FP' and 'Brexit'. The header includes a search bar with the terms and a filter icon. The main content area displays a list of document entries, each with a checkmark, the document title, date, page count, and hit count. The entries are:

- AIR:FP KEPLER: France | Tour de France**: 02.01.19, Pages 26, Hits 1.
- AIR:FP DB: European Aerospace and Def...**: 02.01.19, Pages 23, Hits 1.
- AIR:FP UBS: European Aerospace and De...**: 01.30.19, Pages 31, Hits 3.
- AIR:FP UBS: European Capital Goods "Ca..."**: 01.28.19, Pages 9, Hits 1.
- AIR:FP JEFFERIES: First View: Winging it i...**: 01.24.19, Pages 5, Hits 1.
- AIR:FP BNP: AEROSPACE & DEFENCE :...**: 01.23.19, Pages 134, Hits 17.
- AIR:FP CS: Second Edition Summary Eur...**: 01.22.19, Pages 14, Hits 1.
- AIR:FP UBS: Airbus "Solid 2018 preview,..."**: 01.21.19, Pages 14, Hits 1.
- AIR:FP UBS: Global Aerospace and Airline...**: 01.21.19, Pages 43, Hits 1.
- AIR:FP UBS: European Aerospace and De...**: 01.21.19, Pages 7, Hits 2.



# Mobile Apps: iPad Functionality

- Review your Watchlist / Portfolio

The screenshot displays the 'Portfolio Dashboard' in a mobile application. At the top, there is a search bar and a dropdown menu set to 'Barrons Top 10'. Below the search bar is a table of stock holdings. The table has the following columns: Ticker, Company Name, Owner, Last Updated, Price, Price Target, Upside/Downside, and Recommendation. The table lists ten stocks, including AAPL, GOOGL, ET, DAL, DAI:GR, TOL, DDAIF, CVX, BLK, and GOOG.

Ticker	Company Name	Owner	Last Updated	Price	Price Target	Upside/Downside	Recon
AAPL	APPLE INC	gordon.gekko	13-Nov-2018	\$ 171.25	\$ 210.00	122.63	Buy
GOOGL	Alphabet Inc.	gordon.gekko	13-Nov-2018	\$ 1.00	\$ 1,100.00	96.37	No Po
ET	Energy Transfer LP	-	-	\$ 15.08	\$ 0.00	-	-
DAL	DELTA AIR LINES INC...	nick.carreras	10-Jan-2019	\$ 50.34	\$ 70.00	139.05	Buy
DAI:GR	Daimler AG	nick.carreras	10-Jan-2019	€ 52.17	€ 70.00	134.18	Buy
TOL	TOLL BROTHERS INC	nick.carreras	10-Jan-2019	\$ 36.84	\$ 50.00	135.72	Buy
DDAIF	DAIMLER AG	-	-	\$ 60.65	\$ 0.00	-	-
CVX	CHEVRON CORP	nick.carreras	01-Feb-2019	\$ 119.74	\$ 150.00	125.27	Buy
BLK	BlackRock Inc.	nick.carreras	10-Jan-2019	\$ 417.98	\$ 500.00	119.62	Buy
GOOG	Alphabet Inc.	-	-	\$ 1.00	\$ 0.00	-	-



# Table Extraction Obtaining KPI Data Seamlessly

- 16 Quarters of KPIs with linkback functionality in under 30 seconds

10-K-Q #1001181061002000000 Index		Q4 Columns: Use FY Data FY Columns: On Right Group By: Year Sort By: Year 1 Quarter 1 Cell Data: Table Value																				Plotter	Export				
1	2	Row Label	2014				2015				2016				2017				2018				2014	2015	2016	2017	2018
			Q1	Q2	Q3	Q4 <sup>1</sup>	Q1	Q2	Q3	Q4 <sup>1</sup>	Q1	Q2	Q3	Q4 <sup>1</sup>	Q1	Q2	Q3	Q4 <sup>1</sup>	Q1	Q2	Q3	Q4 <sup>mid</sup>	FY	FY	FY	FY	FY <sup>mid</sup>
3		Average Sales Per Store	2,120	2,144	2,216	2,327	2,424	2,480	2,559	2,377	2,363	2,333	2,248	2,364	2,365	2,335	2,369	2,420	2,399	2,645	2,635		2,327	2,377	2,364	2,420	
4		Average Sales Per Square Foot	1,042	1,009	1,007	1,025	1,038	1,048	1,063	980	960	937	895	937	926	906	909	920	899	985	977		1,025	980	937	920	
5		Stores > \$1 Million In Net Sales	97	97	98	16	99	100	100	99	98	98	98	98	97	97	98	98	98	98	98		16	99	98	98	
6		Stores > \$2 Million In Net Sales	47	46	50	59	63	67	69	62	61	59	54	61	59	58	59	61	60	63	62		59	62	61	61	
7		Average Revenue Per Mattress Unit – Co...	3,373	3,709	3,733	3,671	3,923	4,061	3,992	4,028	3,978	4,206	3,959	4,046	4,053	4,306	4,385	4,283	4,421	4,508	4,387		3,671	4,028	4,046	4,283	

Q2 2018 Index					Q3 2018 Index				
Three Months Ended		Six Months Ended			Three Months Ended		Nine Months Ended		
	June 30, 2018	July 1, 2017	June 30, 2018	July 1, 2017		September 29, 2018	September 30, 2017	September 29, 2018	September 30, 2017
Average sales per store <sup>(1)</sup> (\$ in thousands)	\$ 2,645	\$ 2,535			\$ 2,635	\$ 2,567			
Average sales per square foot <sup>(1)</sup>	\$ 985	\$ 983			\$ 977	\$ 985			
Stores > \$1 million in net sales <sup>(2)</sup>	98%	97%			98%	98%			
Stores > \$2 million in net sales <sup>(2)</sup>	63%	58%			62%	59%			
Average revenue per mattress unit – Company-Controlled channel <sup>(3)</sup>	\$ 4,508	\$ 4,306	\$ 4,439	\$ 4,155	\$ 4,387	\$ 4,385	\$ 4,432	\$ 4,239	

# Redline Filings

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- Pull:
  - Facebook changes to risk factors in recent 10K

Affected users or government authorities could initiate legal or regulatory actions against us in connection with any [actual or perceived](#) security breaches or improper disclosure of data, which could cause us to incur significant expense and liability or result in orders or consent decrees forcing us to modify our business practices. [Such incidents or our efforts to remediate](#) such incidents may also result in a decline in our active user base or engagement levels. Any of these events could have a material and adverse effect on our business, reputation, or financial results.

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[For example, in September 2018, we announced our discovery of a third-party cyber-attack that exploited a vulnerability in Facebook's code to steal user access tokens, which were then used to access certain profile information from approximately 29 million user accounts on Facebook. While we took steps to remediate the attack, including fixing the vulnerability, resetting user access tokens and notifying affected users, we may discover and announce additional developments, which could further erode confidence in our brand. In addition, the events surrounding this cyber-attack became the subject of Irish Data Protection Commission, U.S. Federal Trade Commission and other government inquiries in the United States, Europe, and other jurisdictions. Any such inquiries could subject us to substantial fines and costs, require us to change our business practices, divert resources and the attention of management from our business, or adversely affect our business.](#)

[We anticipate that our ongoing investments in safety, security, and content review will identify additional instances of misuse of user data or other undesirable activity by third parties on our platform.](#)

[In addition to our efforts to mitigate cybersecurity risks, we are making significant investments in safety, security, and content review efforts to combat misuse of our services and user data by third parties, including investigations and audits of platform applications that previously accessed information of a large number of users of our services. As a result of these efforts we have discovered and announced, and anticipate that we will continue to discover and announce, additional incidents of misuse of user data or other undesirable activity by third parties. We may not discover all such incidents or activity, including as a result of our data limitations or the scale of activity on our platform, and we may be notified of such incidents or activity via the media or other third parties. Such incidents and activities may include the use of user data in a manner inconsistent with our terms, contracts or policies, the existence of false or undesirable user accounts, election interference, improper ad purchases, activities that threaten people's safety on- or offline, or instances of spamming, scraping, or spreading misinformation. The discovery of the foregoing may negatively affect user trust and engagement, harm our reputation and brands, require us to change our business practices in a manner adverse to our business, and adversely affect our business and financial results. Any such discoveries may also subject us to additional litigation and regulatory inquiries, which could subject us to monetary penalties and damages, divert management's time and attention, and lead to enhanced regulatory oversight.](#)

