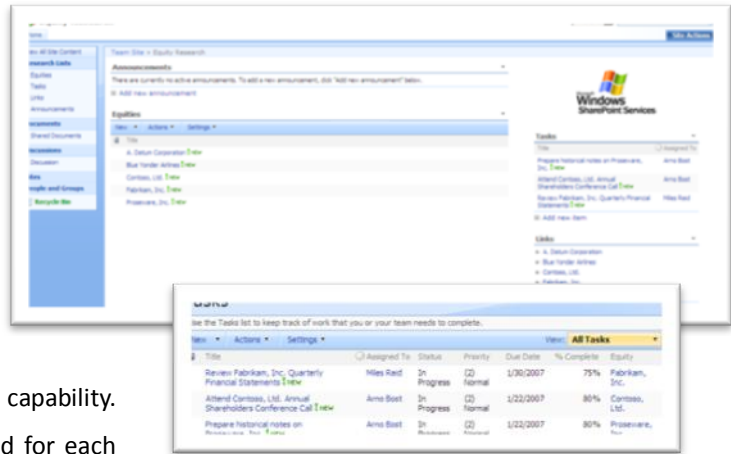


## Application Template: Equity Research

### Description of Template

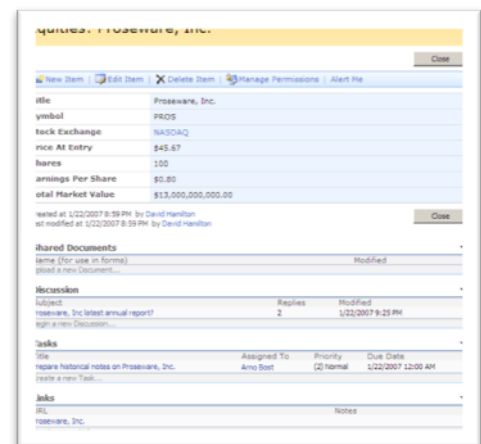
The Equity Research application template for Microsoft® Windows® SharePoint® Services 3.0 helps groups organize the research performed on publicly traded equities. The site allows investment groups to collaborate by uploading documents such as annual and quarterly reports and offering web-based discussion capability. The site also facilitates tracking the price paid for each equity and the number of shares purchased. Links to the company web-sites can be added and a Web-Part provides publicly available industry and company news. Action items for the team can be tracked and assigned to a team member who uses the system to categorize each task by the equity being researched. For each equity, a summary page can be viewed, which lists any shared documents, ongoing discussions, tasks or links that are related to the equity under discussion.

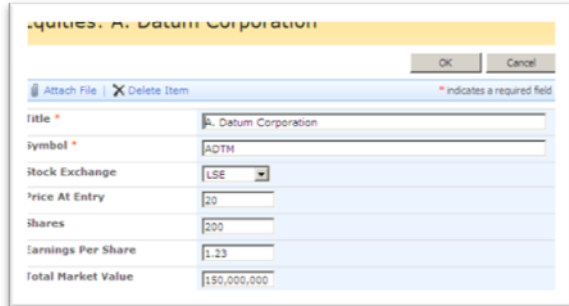


### Sample Activities Performed in this Application Template

The following examples show the various ways Microsoft anticipates this template will be utilized in a typical organization. If you wish to add additional features, please ask your IT provider to research Microsoft Office SharePoint Designer 2007.

Arno Bost, Kim Abercrombie and David Hamilton are friends who have started an informal investment club that researches, buys and sells investments in publicly traded equities. Each month, the friends get together to review each company's financial statements and to discuss whether to buy or sell the equities in their portfolio. The group needed a way to formally manage the process of doing their research as well as a way to collaborate more effectively between meetings. Arno decided to set up the Equity Research site built upon Windows SharePoint Services 3.0 to help the group better track their collaboration efforts.





Equities: A Datum Corporation	
Title *	A Datum Corporation
Symbol *	ADTM
Stock Exchange	LSE
Price At Entry	20
Shares	200
Earnings Per Share	1.23
Total Market Value	150,000,000

After setting up the site, Arno took the first steps of entering information in on the five equities the group had already purchased, including ticker symbol, which stock exchange the equity is traded on as well as information about the number of shares purchased, earnings per share and market capitalization. Once that data was entered, he uploaded all the quarterly and annual statements for each equity and typed in the links to the each company's financial reports web-page.

Today, the group is discussing Proseware, Inc.'s latest annual results. David Hamilton logs in to the site to post a question about the company's results. Through an RSS reader such as the one provided by Microsoft Office Outlook® 2007, both Arno and Kim are notified of the new discussion topic and can log in to post their replies. At the same time, Arno creates a new "Task" reminding him prepare the historical meeting notes on Proseware, Inc. before the next group meeting on January 22<sup>nd</sup>. He wants to determine whether they should buy more of this stock in the first quarter of the year.

### About Microsoft Windows SharePoint Services 3.0

Microsoft Windows SharePoint Services 3.0 is technology in Windows Server® that offers an integrated portfolio of collaboration and communication services designed to connect people, information, processes and systems both within and beyond the organizational firewall. Now available at no additional charge, the technology provides a platform for developing Web-based business applications. Application Templates provide out-of-the-box scenarios to address the needs of specific business processes.

### More Information

For more information on the technologies described in this article, please visit:

Microsoft Windows SharePoint Services 3.0:  
<http://www.microsoft.com/sharepoint>

Application Templates for Windows SharePoint Services:  
<http://www.microsoft.com/sharepointapps>

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