

Thematic Research

A powerful, integrated research ecosystem enabling smarter investment decisions. Quickly identify winners and losers in a highly disruptive landscape

Research Reports

Concise at the top; detailed at the bottom

Sector Scorecard Reports

- Identify winners and losers per sector when all themes are taken into account
- Analyze company performance across key themes, risk, and valuation

Multi Theme Reports

- Covering all stocks, sectors and themes
- Improve decision making with a clear picture of how everything fits together

Single Theme Reports

- Identify winners and losers in a single theme based on technology leadership, market position and other factors
- In-depth research into a specific theme



Understand the big picture

Access an integrated, global thematic ecosystem



Predict disruptive themes

Identify the players & technologies that will disrupt your business



Identify future competitors

Secure the competitive edge with value chain analysis that identifies leaders and laggards



Protect your blindside

Minimize risk by considering all possible themes that could impact your company



Invest in the right companies

Identify the right M&A targets that will drive market share



Corporates

Identify, assess and net off all major themes driving a stock in order to identify the most profitable investment opportunities in the global TMT space.



Investors

Identify which themes to invest in (and which to avoid), which companies to acquire and how well they are positioned thematically in relation to their competitors.



Consulting

We help consultants come up with a turnaround strategy for declining companies by helping them understand how themes impact the future success – or failure – of their clients' businesses.

If you would like to have more information on these reports, please contact your Account Manager or contact us on:

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Thematic Research Reports

Emerging Technology Trends Survey How quickly are businesses adopting emerging technologies like cloud, cybersecurity, artificial intelligence, internet of things, robotics, blockchain and virtual reality?	All themes
BioTechnology Who are the leaders in biotech?	MedTech
Electric Vehicles How will the Electric vehicles theme develop and which companies are in the lead?	Advanced Manufacturing
5G Who will be the winners in the race to 5G?	Mobile Internet, Telecoms
Cryptocurrencies Do cryptocurrencies represent a serious alternative to the established fiat currencies	Blockchain, FinTech
Open Banking Who are the leaders in open banking	FinTech, Payments, Mobile Internet, Regulation
Big Data Who are the winners in big data	Big Data
Internet of Things How will the IoT theme develop?	Internet of Things
Cybersecurity How will the cybersecurity theme develop	Cyber Security
Mobile in Retail Who are the winners and losers in the Mobile theme in Retail	All Themes, Retail
MedTech Who are the winners and losers when tech invades healthcare?	MedTech, Healthcare
3D Printing Which way is 3D Printing headed?	3D Printing
Artificial Intelligence Who are the winners and losers in the AI theme	Artificial Intelligence
Blockchain Who are the winners and losers in the blockchain theme	Blockchain
Autonomous Vehicles Who are the winners and losers in the autonomous vehicles theme	Internet of Things, Artificial Intelligence, Robotics
TMT Predictions 2018 In this report, we look at the big tech themes for 2018, identifying winners and losers for each theme.	All Themes
Tech Regulation The international legal system is struggling with its task of providing a framework for internet governance, given the cross-border flows of online services. A raft of online abuses is likely to force authorities to act unilaterally.	Regulation
TMT Predictions 2018 (Part II of III) What are the big tech themes for 2018 and how will they play out?	All Themes
TMT Predictions 2018 (Part I of III) What are the big tech themes for 2018 and how will they play out?	All Themes

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