

RECOGNIZE OPPORTUNITY. REALIZE PROFIT.



Recognia and TD Waterhouse Successfully Serving Canadian Investors and Traders

The Company

TD Waterhouse Discount Brokerage, a subsidiary of TD Bank Financial Group, ranks among Canada's leading online financial services firms. Today, TD provides a full range of investment and wealth management services and uses innovation to continually improve customer service. In 2006, TD Waterhouse augmented its online research and investment toolkit and as a result they engaged with Recognia. The two companies continue to work together today and just recently, Recognia developed a product in response to feedback from TD Waterhouse's account holder base.

"We are the first major bank-based brokerage in Canada to introduce back-testing to our customers. Back-testing is like reviewing old exams before you write your own exam."

Richard Wilks, Assistant-Vice President, Business Solutions, TD Waterhouse Discount Brokerage.

The Challenge

As the number of online investors and traders grow, so does the competition to earn their business. TD Waterhouse maintains an enviable leadership position among Canadian online brokerages. But as any organization in a competitive marketplace, they continue to assess and improve services to meet clients' evolving and changing needs.

Providing compelling investment tools and information, as well as a superior interaction experience is one opportunity to do so.

The Requirements

2006

- Generate actionable investment ideas that are automated to clients preferences
- Educate users on technical analysis through a guided, hand-held experience
- Integrate seamlessly into TD Waterhouse's own trading platform

2009

- Provide additional strategy building and backtesting features so clients' can develop self influenced investing strategies and test the historical performance of those strategies.

The Solution

In 2006 TD Waterhouse engaged with Recognia, and deployed Recognia's flagship product Technical Insight.

Technical Insight is an online investment research tool that lets investors search for trade or investment opportunities based on technical analysis and chart pattern recognition. Specifically, Technical Insight scans more than 60,000 instruments daily and evaluates each for classic chart patterns, technical indicators and oscillators. It then alerts users to technical events emerging within these instruments. It also offers in-context education that explains the chart patterns emerging, the implications of the chart pattern to the instrument and what this could mean over the short, medium, or long term.

This combination of automated technical analysis, combined with chart pattern recognition and the contextual education had the desired effect: TD Waterhouse made it available to all of their on-line brokerage clients.

In 2009, TD Waterhouse engaged with Recognia. This time the initiative was a product called Strategy Builder that was developed by Recognia in partnership with TD Waterhouse. With Strategy Builder investors can easily create and customize investment strategies using multi-factor models based on both fundamental and technical analysis. Investors can choose from a pre-built library of strategies or mix and match components to build their own strategies. They can then backtest these strategies against 5 years of historical data to see how well they would have fared.

The product's key feature was its ability to do one-step backtesting. This intuitive, easy to use feature allows users to test their strategies before committing, thereby adding another layer of confidence and information to their investment decision making process

The Key Benefits

2006

- Stimulate activity by alerting clients to more investment opportunities that match individual preferences
- Boost users' understanding and confidence of technical analysis by teaching them how the tool is automated as well as explaining charts that have emerged what the implications may be.
- Add new research tools effortlessly to the existing website without changing the existing web structure or user interface.

2009

- Provide a tool to develop and search for multi-fact investment strategies that meet the account-holder preferences.
- Provide backtesting to boost account-holder confidence by allowing them to test strategies.

A Partnership

For five years, TD Waterhouse and Recognia have enjoyed a positive client/vendor relationship. Not only does Recognia keep the communication lines open between its development team and the client, its dedicated client relations staff operate as a second level help desk. Recognia even hosts information seminars for TD Waterhouse's investor groups.

Like TD Waterhouse, Recognia is using innovation and communication to continually improve customer service and to maintain its coveted position among North America's leaders.

The screenshot displays the TD Waterhouse website interface. At the top, the TD Waterhouse logo and 'WebBroker' tagline are visible, along with links for Sitemap, Contact Us, Go to EasyWeb, and Logout. The main navigation bar includes 'My Accounts', 'Customer Service', 'Products & Services', 'Markets & Research', and 'Planning'. Below this, a secondary navigation bar lists 'Markets', 'Stocks', 'Mutual Funds', and 'Investment Ideas'. The left sidebar contains a vertical menu with options like 'My Homepage', 'Account Details', 'Order Entry', 'Fixed Income', 'New Issues', 'Real-Time Quotes', 'Portfolios', 'Open New Account', and 'Your Experience'. The main content area is titled 'Markets' and 'Technical Analysis', with sub-links for 'Overview', 'News', 'Indices', 'Calendar', 'Reports', 'Technical Analysis', and 'Sectors & Industries'. The 'Overview' section provides an introduction to technical analysis. Below this, there are two boxes for 'Today's Bullish Events' and 'Today's Bearish Events', each listing stock symbols and country flags. To the right, there's a 'Recent Event Alerts' section showing '22 New Technical Events™' and a 'Technical Insight™' search box with a 'Security' dropdown and a 'Search' button. At the bottom right, an 'Education Material' section features a 'Featured Event Type: Exhaustion Bar (Bearish)' with a 'Search' button. A 'Technical Event™ Stock Screener' section is also present, offering an 'Advanced' search option and a 'Select a Preset Search' dropdown.

About Recognia

Recognia is the industry leader providing actionable investment research products for on-line brokers. Our compelling product suite uses automated interpretation of technical, fundamental and value based analytics to increase account-holder engagement and boost trader confidence. Recognia helps to automate the investment decision making process by offering dynamic and action-oriented trading ideas for all trader types, in order to execute timely trade transactions with confidence. Recognia provides coverage of more than 50 exchanges worldwide, including stocks, equities, forex, indices, currencies and futures.

Founded in 2000, in Canada's National Capital region of Ottawa, Recognia today has more than 20 million provisioned accounts worldwide and our products service the largest and most successful on-line brokerage firms and institutions including; Bloomberg, Thomson-Reuters, Saxobank, E-Trade, HSBC, ICICI Direct and Reliance Money to name a few.