

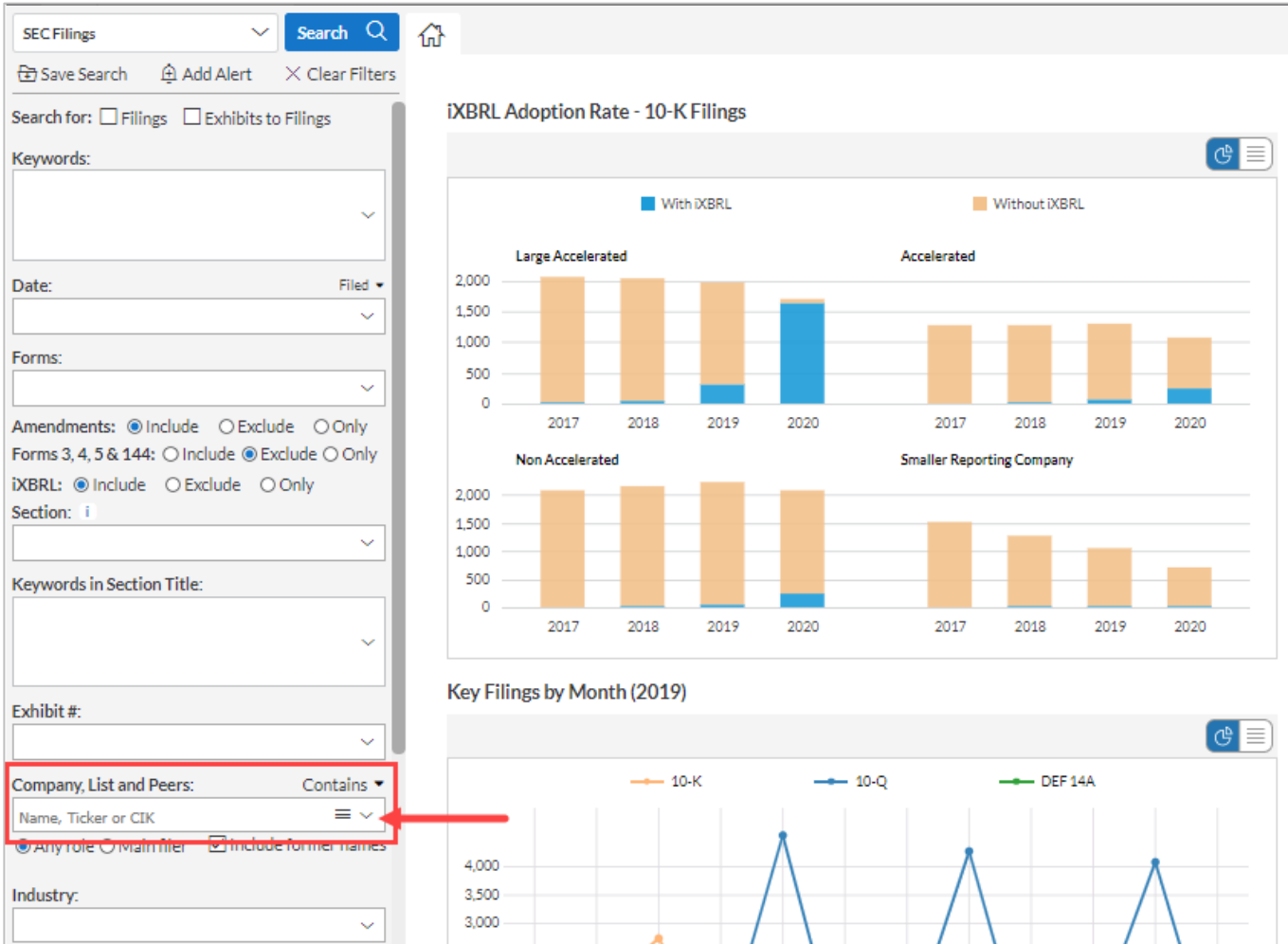
# Creating and Customizing Peer Company Groups in Intelligize

**Challenge:** You're looking for the peer group for APPL (Apple, Inc) to benchmark executive compensation. You're aware that Apple may have referenced multiple peer groups in its Proxy and you only want to use its primary peer group

**Solution:** The Intelligize platform is the perfect solution to quickly and efficiently find peers as listed in a company's proxy. Additionally, you can customize and create your own company lists.

## Step 1:

For our example, we will start in the **SEC Filings application**. Click on the  to expand the Company, List and Peers filter.



The screenshot displays the Intelligize SEC Filings application interface. On the left, a sidebar contains various filters. The 'Company, List and Peers' filter is highlighted with a red box, and its dropdown menu is expanded, showing options like 'Name, Ticker or CIK' and 'Any role'. The main content area features three charts: 'iXBRL Adoption Rate - 10-K Filings' (stacked bar chart showing 'With iXBRL' and 'Without iXBRL' for four categories: Large Accelerated, Accelerated, Non Accelerated, and Smaller Reporting Company, from 2017 to 2020), and 'Key Filings by Month (2019)' (line chart showing 10-K, 10-Q, and DEF 14A filings).

**Step 2:**

In the company field you can enter the stock symbol, CIK or type the company name. Below, we start to type Apple Inc and find the company we are looking for (AAPL).

The screenshot shows a search interface for companies. On the left, there are filter fields for Industry, Incorporated In (State/Country), Headquarters (State/Country), Headquarters (ZIP/City), Index, Exchange, and Accelerated Status. The main search area has a 'Company and Peer Search' tab, a 'My Saved Lists' tab, and a 'Selected Companies (0)' tab. The search field contains 'Apple I' and is highlighted with a red box. Below the search field, there are buttons for 'Print', 'Download', 'Email', 'Excel List', 'Configure Columns', and 'Create/Edit My Saved Lists'. The search results table has columns for 'Company Name', 'Market Cap', 'Ticker Symbol', and 'CIK'. The first row is 'APPLE INC.' with a market cap of '\$1.66T' and ticker symbol 'AAPL'. A red arrow points to the 'View Peers' button for this row.

Company Name	Market Cap	Ticker Symbol	CIK
<input type="checkbox"/> APPLE INC. APPLE INC (until 08/05/2019) APPLE COMPUTER INC (until 01/04/2... APPLE COMPUTER INC/ FA (until 07/...	\$1.66T	AAPL	000032019
<input type="checkbox"/> APPLE INFORMATION SERVICES INC			000080038
<input type="checkbox"/> APPLE INVESTMENT ASSOCIATES /ADV			000077352
<input type="checkbox"/> APPLE INVESTORS INC			000072942
<input type="checkbox"/> APPLE INVESTORS LLC			000109465
<input type="checkbox"/> CLEVELAND APPLE INVESTOR L.P.			000166913
<input type="checkbox"/> CRAB APPLE INSURANCE CO LTD			000081622
<input type="checkbox"/> EQUITY APPLE, INC.			000177705
<input type="checkbox"/> GOLDEN APPLE INCOME INC			000126952

Step 3:


By clicking on the **View Peers** button, we will see Apple's peers as identified in its proxy.

Company: Apple I Contains  Include former names My Company

28 companies selected Email Excel List Configure Columns Create/Edit My Saved Lists

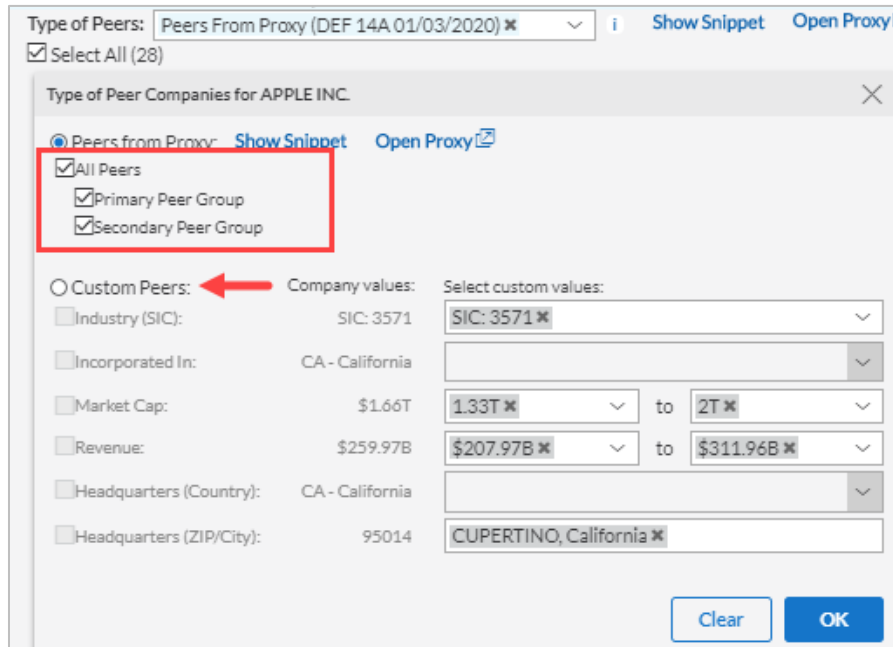
Company Name	Market Cap	Ticker Symbol	CIK
<input type="checkbox"/> APPLE INC. <a href="#">Hide Peers</a>	\$1.66T	AAPL	00003201
APPLE INC (until 08/05/2019)			
APPLE COMPUTER INC (until 01/04/2019)			
APPLE COMPUTER INC (until 07/07/2019)			
Type of Peers: Peers From Proxy (DEF 14A 01/03/2020) ✖		<a href="#">Show Snippet</a>	<a href="#">Open Proxy</a>
<input checked="" type="checkbox"/> Select All (26)			
<input checked="" type="checkbox"/> ALPHABET INC.	\$1.05T	GOOGL	00016520
<input checked="" type="checkbox"/> AMAZON COM INC	\$1.60T	AMZN	00010181
<input checked="" type="checkbox"/> AT&T INC.	\$214.68B	T	00007321
<input checked="" type="checkbox"/> CHARTER COMMUNICATIONS, INC. /MO/	\$125.98B	CHTR	00010911
<input checked="" type="checkbox"/> CISCO SYSTEMS, INC.	\$197.01B	CSCO	00008581
<input checked="" type="checkbox"/> COMCAST CORP	\$184.89B	CMCSA	00011661
<input checked="" type="checkbox"/> WALT DISNEY CO	\$215.56B	DIS	00017441
<input checked="" type="checkbox"/> FACEBOOK INC	\$698.78B	FB	00013261
<input checked="" type="checkbox"/> INTERNATIONAL BUSINESS MACHINES CORP	\$105.08B	IBM	00000511
<input checked="" type="checkbox"/> INTEL CORP	\$252.05B	INTC	00000501
<input checked="" type="checkbox"/> MICROSOFT CORP	\$1.62T	MSFT	00007891
<input checked="" type="checkbox"/> ORACLE CORP	\$176.11B	ORCL	00013411
<input checked="" type="checkbox"/> QUALCOMM INC/DE	\$104.07B	QCOM	00008041
<input checked="" type="checkbox"/> TIME WARNER CABLE ENTERPRISES LLC			00008931
<input checked="" type="checkbox"/> TWENTY-FIRST CENTURY FOX, INC.			00013081
<input checked="" type="checkbox"/> VERIZON COMMUNICATIONS INC	\$225.48B	VZ	00007321
<input checked="" type="checkbox"/> VISA INC.	\$409.94B	V	00014031
<input checked="" type="checkbox"/> 3M CO	\$87.92B	MMM	00000661
<input checked="" type="checkbox"/> AMERICAN EXPRESS CO	\$75.05B	AXP	00000041
<input checked="" type="checkbox"/> BOEING CO	\$100.70B	BA	00000121
<input checked="" type="checkbox"/> COCA COLA CO	\$193.91B	KO	00000211
<input checked="" type="checkbox"/> GENERAL ELECTRIC CO	\$58.52B	GE	00000401
<input checked="" type="checkbox"/> JOHNSON & JOHNSON	\$375.09B	JNJ	00002001
<input checked="" type="checkbox"/> NIKE, INC.	\$152.38B	NKE	00003201
<input checked="" type="checkbox"/> PEPSICO INC	\$186.56B	PEP	00000771
<input checked="" type="checkbox"/> PFIZER INC	\$187.92B	PFE	00000781
<input checked="" type="checkbox"/> PROCTER & GAMBLE CO	\$306.71B	PG	00000801
<input checked="" type="checkbox"/> UNITEDHEALTH GROUP INC	\$276.20B	UNH	00007311
<input type="checkbox"/> APPLE INFORMATION SERVICES INC <a href="#">View Peers</a>			00008001
<input type="checkbox"/> APPLE INVESTMENT ASSOCIATES (ADV)			-----

We can take a closer look at Apple's peer list by clicking on the  in the Type of Peers filter.

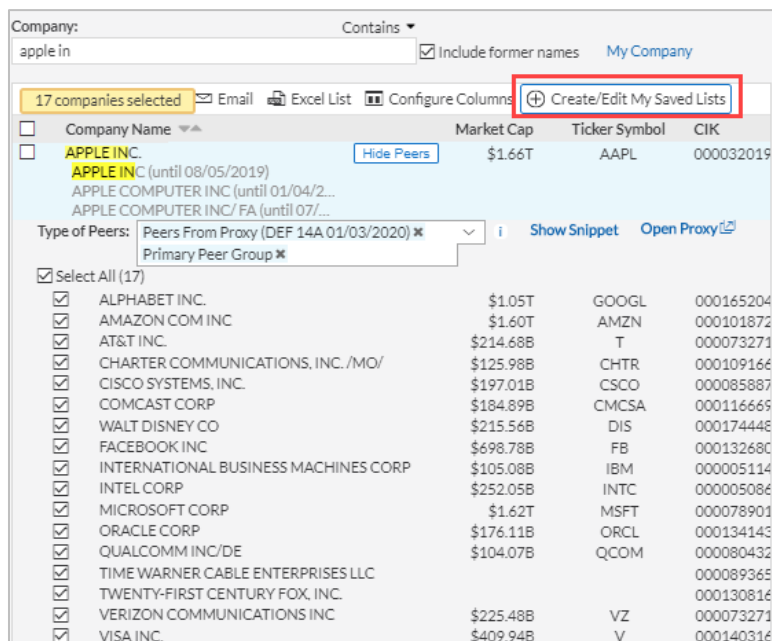
Type of Peers: Peers From Proxy (DEF 14A 01/03/2020) ✖  [Show Snippet](#) [Open Proxy](#)

In Apple's case, it has both a Primary Peer Group and Secondary Peer Group in its proxy. With this expanded filter, we can choose the primary or secondary group, or create our own custom peer group based on a variety of filters including SIC Code, Market Cap, etc.

**Note: Intelligize lists the peer groups as they appear in the company's proxy** (Apple identifies its peer lists as Primary Peer Group and Secondary Peer Group, but other organizations may label them differently).



In our example, we just want to look at Apple's Primary Peer Group. This cuts the original number of 28 peers down to 17.



## Saving the Peer List

You can easily save this list of primary peers so you don't have to look it up each time. Simply select all the companies and press the **Create / Edit My Saved Lists** button. Let's save this as a new list called AAPL Primary Peers.

Print Download Email Excel List Configure Columns Create/Edit My Saved Lists

Company Name	Market Cap	Ticker Symbol	CIK
APPLE INC.	\$1.66T	AAPL	0000320
APPLE INC. (until 08/05/2019)			
APPLE COMPUTER INC. (until 01/04/2...			
APPLE COMPUTER INC/ FA (until 07/...			

Type of Peers: Peers From Proxy (DEF 14A 01/03/2020) \*  
Primary Peer Group \*

Select All (17)

<input checked="" type="checkbox"/>	ALPHABET INC.	\$1.05T	GOOGL	0001652
<input checked="" type="checkbox"/>	AMAZON COM INC	\$1.60T	AMZN	0001018
<input checked="" type="checkbox"/>	AT&T INC.	\$214.68B	T	0000732
<input checked="" type="checkbox"/>	CHARTER COMMUNICATIONS, INC. /MO/	\$125.98B	CHTR	0001091
<input checked="" type="checkbox"/>	CISCO SYSTEMS, INC.	\$197.01B	CSCO	0000858
<input checked="" type="checkbox"/>	COMCAST CORP	\$184.89B	CMCSA	0001166
<input checked="" type="checkbox"/>	WALT DISNEY CO	\$215.56B	DIS	0001744
<input checked="" type="checkbox"/>	FACEBOOK INC	\$698.78B	FB	0001326
<input checked="" type="checkbox"/>	INTERNATIONAL BUSINESS MACHINES CORP	\$105.08B	IBM	0000051

AAPL Primary Peers Save New List OR Add to Existing List

<input checked="" type="checkbox"/>	ALPHABET INC.	\$1.05T	GOOGL	0001652
<input checked="" type="checkbox"/>	AMAZON COM INC	\$1.60T	AMZN	0001018
<input checked="" type="checkbox"/>	AT&T INC.	\$214.68B	T	0000732
<input checked="" type="checkbox"/>	CHARTER COMMUNICATIONS, INC. /MO/	\$125.98B	CHTR	0001091
<input checked="" type="checkbox"/>	CISCO SYSTEMS, INC.	\$197.01B	CSCO	0000858
<input checked="" type="checkbox"/>	COMCAST CORP	\$184.89B	CMCSA	0001166
<input checked="" type="checkbox"/>	WALT DISNEY CO	\$215.56B	DIS	0001744

**Note:** You can create a new list or add to an existing list. To add to an existing list, choose the list from the dropdown and click Ok. **Saved lists are not application specific.** For example, if you create a list in SEC Filings, it is also available in Section Analysis & Trends, etc.

Company, List and Peers Help X

Company and Peer Search My Saved Lists Selected Companies (17)

AAPL Primary Peers (17)  
AAPL Peers (28)  
General Electric Peers (23)

Company: Contains  
Company, Ticker Symbol or CIK

17 companies selected Email Excel List Configure Columns

Company Name	Market Cap	Ticker Symbol	CIK
<input checked="" type="checkbox"/> ALPHABET INC.	\$1.05T	GOOGL	000165204
<input checked="" type="checkbox"/> AMAZON COM INC	\$1.60T	AMZN	000101872
<input checked="" type="checkbox"/> AT&T INC.	\$214.68B	T	000073271
<input checked="" type="checkbox"/> CHARTER COMMUNICATIONS, INC. /MO/	\$125.98B	CHTR	000109166
<input checked="" type="checkbox"/> CISCO SYSTEMS, INC.	\$197.01B	CSCO	000085887
<input checked="" type="checkbox"/> COMCAST CORP	\$184.89B	CMCSA	000116669
<input checked="" type="checkbox"/> FACEBOOK INC	\$698.78B	FB	000132680
<input checked="" type="checkbox"/> INTEL CORP	\$252.05B	INTC	000005086
<input checked="" type="checkbox"/> INTERNATIONAL BUSINESS MACHINES CORP	\$105.08B	IBM	000005114
<input checked="" type="checkbox"/> MICROSOFT CORP	\$1.62T	MSFT	000078901

We are now on the My Saved Lists tab and can see our newly created list, AAPL Primary Peers. To use this list to complete our work, we click Ok. You will see that 17 companies are now included in the Company filter.

SEC Filings Search

Save Search Add Alert Clear Filters

Amendments:  Include  Exclude  Only

Forms 3, 4, 5 & 144:  Include  Exclude  Only

iXBRL:  Include  Exclude  Only

Section:

Keywords in Section Title:

Exhibit #:

Company, List and Peers: Contains

17 Companies \* ←

Any role  Main filer  Include former names

## Completing our Challenge

Thinking back to our original challenge, we wanted to benchmark executive compensation for Apple's primary peer companies. Let's go into **Section Analysis & Trends** to do this. Saved lists can now be easily found in the company filter. As we type aapl, we see not only Apple Inc, but also lists that we have saved including our AAPL Primary Peer list.

Section Analysis & Trends Search

Save Search Add Alert Clear Filters

Section Analysis & Trends

- This database contains selected clauses, sections, and items including those on forms 10-K, 10-Q, 20-F, 8-K, S-1, S-3, S-11, and DEF 14C, including amendments.

Company, List and Peers: i Contains

aapl

Contains "aapl" Free text

APPLE INC.	Company	AAPL	0000320193
AAPL Peers (28)	Company List	FB, VZ, NKE	
AAPL Primary Peers (17)	Company List	CHTR, ORCL, CSCO	

←

In addition to the AAPL Primary Peer lists, we also want to filter for the last 3 years in the Date Filed field and Elements of Executive Compensation the Section Type field.

Section Analysis & Trends Search Results: 200 Analytics 1

Save Search Add Alert Clear Filters

Section Type: Global > Compensation Discussion and Analysis > Elements of Compensation

Keywords in Section Title:

Keywords in Section:

Date Filed: Last 3 Years

Company, List and Peers: AAPL Primary Peers (17) Contains

Include former names

Section Type Filter Panel:

Form Types: Global, 10-K, 10-Q, 20-F, 8-K, Proxies, S-1, S-3, S-11, F-1, 424B

Type to filter:

- Compensation Discussion and Analysis
  - ENTIRE SECTION TEXT
  - ALL SUBSECTIONS
  - 10b5-1 Sales
  - 401(k) Plan
  - Additional Disclosures
  - Charitable Contributions
  - Compensation Committee
  - Compensation Discussion and Analysis
  - Deferred Compensation
  - Determining Compensation/Review Process
  - Director Compensation
  - Elements of Compensation
  - Equipment Re-lease Fee

1 item(s) selected

Clear OK

Our Search yields 200 results.

Section Analysis & Trends Search Results: 200 Save Tabs

Save Search Add Alert Clear Filters Print Download Email Save to Workspace Excel List Compare Analytics Dismiss Alert

Display:  Snippets  Filing Info  Company Info  Redline Past Version Settings

Filters: Section Type: Global > Compensation Discussion and Analysis > Elements of Compensation Date Filed: Last 3 Years Company, List and Peers: AAPL Primary Peers (17)

	Section Type	Form	Company	Date Filed
<input type="checkbox"/>	Proxies > Compensation Discussion and Analysis > Elements of Compensation	DEF 14A	COMCAST CORP	04/24/2020
<input type="checkbox"/>	Proxies > Compensation Discussion and Analysis > Elements of Compensation	DEF 14A	COMCAST CORP	04/24/2020

**Termination of Employment.**  
Termination of Employment. Except as otherwise provided by a retirement policy or in an applicable award or employment or other agreement, upon termination of employment, all awards that are then still subject to restrictions or that have not vested will be forfeited. Please see "Executive Compensation – Potential Payments upon Termination or Change in Control" for information on our retirement policy applicable to our NEOs as it relates to the continued vesting and exercisability of awards following retirement.

**Amendment or Termination.**  
Amendment or Termination. The Option Plan may be amended by our Board or the Compensation Committee and may be terminated by our Board at any time, provided that amendments to change the class of individuals eligible to receive ISOs, extend the expiration date of the Option Plan, decrease the minimum exercise price of an ISO or increase the maximum number of shares for which Options may be granted (other than as a result of adjustments due to certain corporate events) are not effective unless shareholder approval is obtained within twelve months before or after such action. Shareholder approval will be obtained for an Option Plan amendment if it is determined to be required by or advisable under applicable law, regulation or NASDAQ Global Select Market rules.

By clicking the Analytics button, you will see an analysis of trends and frequency of disclosure topics for Elements of Compensation compared to the previous reporting period and what's market, by showing the percent of filings the search produced that contain the topic of interest. At a glance you can see the disclosure trends associated with Elements of Compensation across SEC filings.

Info		Annotations		Results: 200		Analytics 2		Save Tabs
Total # Sections:	48058			Print		Download		Email
Total # Section Types:	33			Excel List				
Total # Documents:	13557			Display: <input checked="" type="checkbox"/> Form/Section		<input type="checkbox"/> Documents %		<input type="checkbox"/> Sections Count
Prior Period:	07/15/2014 - 07/14/2017			<input type="checkbox"/> Sections %		<input checked="" type="checkbox"/> Prior Period Documents		
				Filters: Section Type: Global		Compensation Discussion and Analysis		Elements of Compensation
				Date Filed: Last 3 Years				
				Company, List and Peers: AAPL Primary Peers (17)				
Section Type				Documents	Prior Period Documents	What's Market		Change
1	Proxies > Compensation Discussion and Analysis > Elements of Compensation			11,821	12,589			-6.10%
2	10-K > Item 11. Executive Compensation > Elements of Compensation			1,664	1,906			-12.70%
3	Proxies > Compensation Discussion and Analysis > Deferred Compensation			415	453			-8.39%
4	Proxies > Compensation Discussion and Analysis > Miscellaneous			326	147			+121.77%
5	Proxies > Compensation Discussion and Analysis > Stock Option			204	238			-14.29%
6	Proxies > Compensation Discussion and Analysis > Determining Compensation/Review Process			179	139			+28.78%
7	Proxies > Compensation Discussion and Analysis > Overview/Objectives			179	218			-17.89%
8	10-K > Item 11. Executive Compensation > Summary Compensation Table			174	204			-14.71%
9	Proxies > Compensation Discussion and Analysis > Outstanding Equity Awards at Fiscal Year-End			136	148			-8.11%
10	Proxies > Compensation Discussion and Analysis > Director Compensation			81	80			+1.25%
11	10-K > Item 11. Executive Compensation > Deferred Compensation			53	70			-24.29%
12	Proxies > Compensation Discussion and Analysis > Clawbacks			42	31			+35.48%
13	S-1 > Item 6. Directors, Senior Management and Employees > B. Compensation > Compensation Dis...			37	64			-42.19%
14	Proxies > Compensation Discussion and Analysis > Option Exercises and Stock Vested			24	31			-22.58%
15	20-F > Item 6. Directors, Senior Management and Employees > B. Compensation > Compensation D...			22	17			+29.41%

You can click into any of the trends or into the individual search results to complete your benchmarking activity.