



## Unlock the Power of Seamless Data with Intelligize

Step into a new era of data integration with Intelligize, your trusted partner in transforming how you access, analyze, and act on critical insights. Intelligize's industry-leading data—relied upon by Am Law 100 firms and Fortune 500 companies—is available directly through our REST API. Say goodbye to the complexity of piecing together data from scattered sources. With the Intelligize API, you gain a secure, automated, and scalable solution that delivers real-time insights tailored to your needs—right where your team needs them most.

By integrating Intelligize's robust data with your internal systems, dashboards or third-party tools, you can unlock unparalleled flexibility and innovation. Whether you're building custom datasets, enhancing existing products, or creating entirely new solutions, the Intelligize API empowers you to stay ahead of the curve and drive smarter decisions with confidence.

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## Drive Value Like Never Before

- **Stay Ahead of the Competition:** Leverage real-time industry updates to act faster and smarter.
- **Transform Financial Models:** Build powerful predictive analytics to forecast trends and optimize strategies.
- **Enhance Business Development & R&D:** Uncover opportunities and fuel innovation with actionable insights.
- **Strengthen Due Diligence & Risk Monitoring:** Mitigate risks with comprehensive, up-to-the-minute data.
- **Support Internal Research:** Empower your team with robust tools to dig deeper and analyze smarter.

## Why Choose the Intelligize API?

With the Intelligize API, you're not just accessing data—you're building a bridge to smarter, more connected and more competitive outcomes.

- **Automation & Efficiency:** Eliminate manual data collection and streamline workflows with seamless system-to-system communication.
- **Real-Time Access:** Tap into live, up-to-date data—perfect for industry updates, financial trends or compliance monitoring.
- **Scalability:** Grow effortlessly by leveraging Intelligize's powerful infrastructure without building your own from scratch.
- **Customization:** Pull only the data you need, tailored to your specific use case, for maximum relevance and impact.
- **Integration:** Connect effortlessly with CRMs, portals or matter management tools to enhance your ecosystem.
- **Security:** Rest easy with built-in authentication and secure access controls protecting your data.
- **Innovation:** Build groundbreaking tools, features or apps by harnessing Intelligize's rich dataset and connecting it to your own data.



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## Available API Components include:

### Company Information

Contains useful SEC and financial-related information for thousands of companies.

- Insiders - 10 years of insider transaction data extracted from Forms 3, 4 & 5.
- Accountants - accountants information from form 10-Ks, DEF14s and 8-Ks.
- Stock Price - 10 years of end of day pricing provided.
- Financials - 10 years of annual reports and 8 quarters of quarterly reports.

Estimates - 3 years of annual consensus estimates and 8 quarters of quarterly consensus estimates.

### Insiders

- Insiders data contains electronically released Form 3, 4, and 5 filings from 2003 to the present. Filings are updated approximately 1 minute after they are uploaded by the SEC.
- Search by filing or by transaction using a variety of search filters, as well as full text search on a filing's footnotes.

### SEC Filings

- Our database of SEC filings contains all electronically released SEC filings from 1994 to the present, and an indexed list of all SEC filings dating back to 1960.
- We add new filings to our database as soon as they are publicly available
- You can search for filings by filer, date filed, form type, and a variety of other filters, such as accounting standard, fiscal year end, amendments, and many more.
- Major filings (forms 10-K, 10-Q, 20-F, 8-K, 6-K, S-1, S-3, S-4, S-11, F-1, F-3, 424) are broken down into their constituent sections and items, so you can specify exactly where desired text appears.
- Unique Feature: We provide links, when possible, to the exhibits incorporated by reference in each filing.

### Comment Letters

- Our database of Comment Letters contains all electronically released comments from the SEC on company filings, as well as response letters from company filers.
- We break down each letter into individual comments and responses, and then match each response with the comment it addresses to create a correspondence thread that spans multiple letters.
- You can search for comments by SEC examiner, the topic of comment, the responding law firm and many other filters.
- Gain a high-level understanding of the comment letter landscape by exploring the analytics on the home screen or hit the analytics button from the results grid to generate the analytics offered in the application based on your specific, customized search.
- Unique Feature: locate comments similar to one you have received or found using our machine-learning-driven similar comments functionality.



## Mergers & Acquisitions

Database of Mergers & Acquisitions containing more than 41,000 transactions, each for \$1 million or more, from 2008 to the present.

- Each transaction contains a bundle of relevant filings and exhibits, such as a merger agreement or a press release announcing the deal. Altogether we have aggregated more than 518,000 deal-related documents.
- Includes more than 90 filters, such as target / acquirer, transaction type, transaction size, the presence of a poison pill, etc.
- All new transactions are added to our database within 1 business day of the first filing's release date.

## Environmental, Social & Governance

- Our Environmental, Social & Governance (ESG) application enables you to identify trends, see ESG rankings, research model language and establish what's market for ESG disclosure.
- ESG Reports - Search more than 19,100 reports that outline companies' environmental, social and governance impacts.
- Corporate Governance & Presentations - Evaluate more than 170,600 board committee charters, company governance policies and investor relations presentations that traditionally govern company operations.
- SEC Filings - Mine a curated set of more than 436,700 EDGAR-filed documents that significantly cover ESG topics.
- Transcripts - Review more than 26,400 quarterly, annual, special and corrected analyst meeting transcripts for tagged discussion of conversational ESG disclosure.
- News - Assess the market's perspective of ESG issues in more than 11,312,210 business news articles.
- No-Action Letters - Track more than 1,800 ESG No-Action Letters from exclusion requests to vote results.
- Comment Letters - Explore company responses to more than 280 Comment Letters on ESG topics.

## A Trusted Data Partnership

The Intelligize API allows you to integrate and customize our trusted content with your data. Whether you're doing the work yourself or working with a third-party developer, you'll get access to our developer advocate team to help with technical implementation, plus API documentation with explanations in plain English. You can trust in our commitment to excellence—we're applying the same meticulous care to your API implementation as we do to our own data.

Find out more about Intelligize APIs

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