

100% Verifiable Business Information & Financial Metrics

BizQualify leverages Form 5500 filings with the **IRS & Labor Dept.**, which cover employee benefit plans (e.g., health insurance, 401k) for **1M companies with 100M employees** (90% of the U.S. labor force). These filings are subject to audit & consistency with IRS tax returns. In addition, BizQualify collects regulatory filings and scrapes the websites of **10M+ companies**.

Data Features

Monthly updates & historical data back to 2010. The data is:

- **Verifiable:** due diligence equivalent to IRS tax returns.
- **Predictive:** stock price returns, bankruptcy, customer engagement.
- **Ideal for private companies:** standardized financial filings for private & public companies.

Financial Metrics

250+ financial metrics derived from IRS filings, including:

- **Growth & trends:** track employment & revenue indicators over 5+ years.
- **Financial indicators:** profit-sharing, 401k contributions, insurance plans.
- **Firmographics:** derived from IRS filings and scraped corporate websites.

BQ Eikon App

The screenshot shows the BizQualify Eikon App interface. On the left, there are search filters for Company Name, Website, RIC, Ticker, EIN, City, State, Zip Code, Industry Classification, and Industry Name. The main area displays search results for companies in the 'Other Computer Related Services' industry. The results table includes columns for Form 5500 filer, Company Name, Industry, City, State, Employees, Revenue, EBITDA, and Action.

Form 5500 filer	Company Name	Industry	City	State	Employees	Revenue	EBITDA	Action
YES	INTERNATIONAL BUSINESS MACHINES CORPORA	Other Computer Related Services	Armonk	NY	184,555	\$79,900,000,000	\$17,100,000,000	Show Report
YES	ORACLE AMERICA	Other Computer Related Services	Redwood City	CA	51,732	\$37,000,000,000	\$15,600,000,000	Show Report
YES	ALORICA	Other Computer Related Services	Irvine	CA	41,509	\$14,183,825,000	\$1,570,418,000	Show Report
YES	SALESFORCE.COM, INC.	Data Processing, Hosting, & Related Services	San Francisco	CA	12,428	\$8,391,984,000	\$693,982,000	Show Report
YES	YAHOO INC	Other Computer Related Services	Sunnyvale	CA	10,186	\$5,169,135,000	\$311,891,000	Show Report
YES	VMWARE, INC.	Other Computer Related Services	Palo Alto	CA	9,550	\$7,090,000,000	\$1,840,000,000	Show Report
YES	SYMANTEC CORPORATION	Other Computer Related Services	Mountain View	CA	8,446	\$4,020,000,000	\$703,000,000	Show Report
YES	LINKEDIN CORPORATION	Other Computer Related Services	Mountain View	CA	6,953	\$2,375,840,000	\$263,054,000	Show Report
YES	NETAPP	Other Computer Related Services	Sunnyvale	CA	6,266	\$5,550,000,000	\$692,000,000	Show Report

Solutions

Private company analysis:

for the investment banker, PE professional or VC

- Due diligence
- Prospecting

Public company analysis:

for the equity analyst, quant or institutional investor

- Fundamental research
- Quantitative analysis

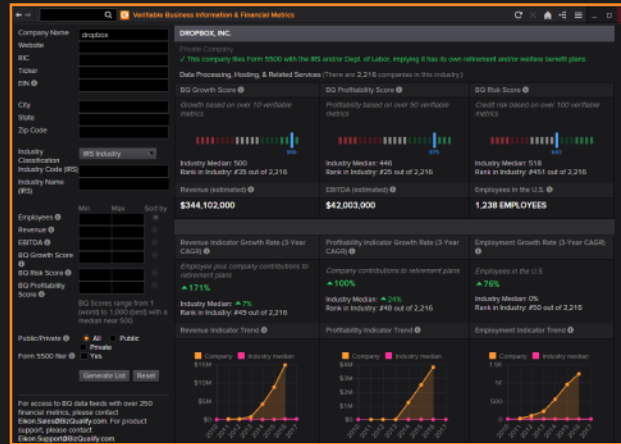
Private Company Analysis

For the investment banker, private equity professional, or venture capitalist

Form 5500 filer IRS metrics & trends (1M companies):

Leverage audited IRS Form 5500 filings pertaining to employee welfare benefits & retirement plans to generate 100% verifiable financial metrics on 1M companies (accounting for 100M employees, 90% of the U.S. labor force).

- Verifiable firmographics: industry, address, phone, contact, & email directly from IRS filings.
- Standardized cash-based metrics: financial performance, employment, revenue, growth, profitability, and credit risk for public & private companies.



Use the data to conduct:

- Due diligence: research a private company in depth and benchmark it against private & public industry peers using standardized financial data.
- Prospecting: create lists of private companies based on EBITDA, revenue, employment, industry, location, growth, credit risk, & profitability.

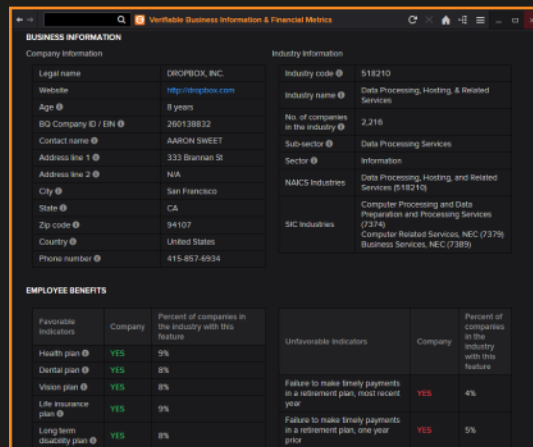
Public Company Analysis

For the equity analyst, quant, or institutional investor

U.S. public company IRS metrics & trends (4k tickers):

Obtain 250+ new financial metrics derived from IRS filings on 4k active public companies (traded on NYSE or NASDAQ) from 2010 – present, updated monthly. Deutsche Bank found these metrics to be predictive of stock price returns:

- BQ Growth Score: 1-year & 3-year growth rates of employment, revenue, profitability, and other cash-based metrics normalized by industry.
- Employee vs. company contributions: greater employee contributions indicate higher compensation and better performance; as insiders, employees buy company stock (via 401k) only if the company is doing well.
- Employee welfare benefit indicators: the extent of benefit plan coverage has a positive impact on stock price returns; better treatment of employees is associated with superior performance.



Use the data to conduct:

- Fundamental research: cash-based accounting metrics from audited IRS Form 5500 filings provide new insight.
- Quantitative analysis: industry-normalized metrics relating to growth, employment, benefits, and dollar contributions are proven to be predictive.