

## SPYDER Product Fact Sheet

Spyder is an advanced Client Relationship Alignment Management System. Spyder is unique in that it directly and relevantly addresses the needs of financial sector – Investment Banking, Institutional Equities, Research Departments, Mutual Fund & Insurance Distribution agencies. Unlike most systems in the market, Spyder is not a generic Customer Relationship Management (“CRM”) system that has been adapted to “sort of fit” the industry.

Spyder incorporates specific concepts that take it from being just a “useful client database” to an essential tool that is proven to help identify and coordinate revenue opportunities, reduce operational costs and manage distributed resources.

Spyder was conceived as a result of the identification that the existing generation of CRM systems were failing to add value to the industry. The most important feature of Spyder is that it has been designed from the ground up to understand the product that this industry sells. This is implemented in the form of a *product matrix* that sits at the heart of the system. All Spyder’s functions revolve around this *highly configurable* matrix.

### Key Features and Benefits

- Single consolidated view of client interactions – e.g., email, voicemail, meetings, etc.
- Hierarchical contact database.
- Customer Interest /Product Matrix to drive all interactions with customers ensuring complete alignment of services with their interest.
- Fully-integrated Document Management, Workflow and Distribution Systems – automatic distribution of product to specific contacts.
- Comprehensive correspondence logging – easy logging and viewing of all events relating to each contact at any level in the hierarchy.
- Ability to attach files at any level to Organizations / Contacts.
- Planning and managing Campaigns & Events with targeted marketing using sophisticated contact identification tool.
- Flexible customer ranking (Tiers).
- Click-to-Dial from Spyder
- Can be accessed through smart phones and mobile communication devices.
- Sending personalized bulk messages (Emails and Bulk SMS).
- Identify gaps in client coverage and service.
- Assigning appropriate staff to customer based on staff expertise and customer interest.
- Event alerts to concerned users.
- Fully audit logged.
- Service level definition and monitoring for staff.
- Extensive and comprehensive role based security and access control.
- Flexible reporting capabilities.



## Spyder Integration Capabilities

- Integration with Mailing Systems (Outlook / Lotus Notes).
- Integration with Telephony and Voice Systems (i.e., PBX, VOIP, Call Recording systems, etc.).
- Integration with BlackBerry.
- Can be integrated with back-end systems of an organization, e.g., trading systems, accounts, etc.

## Spyder Hosting Options

We offer our clients two options for hosting Spyder:

1. We host – we will set up and maintain the system in our environment on our servers and you access through the Internet;
2. You host – you purchase servers and other hardware/software components and maintain the system.

## Commercials

Spyder is available commercially on two options:

1. Rental License or “Software as a Service” (SaaS) option. This option charges are on a per user/per license/per annum basis. Please note that the rental model includes the cost of support: There are NO HIDDEN COSTS, such as “maintenance and support fees”.
2. Purchase License option. This option is for clients who wish to buy the rights to use Spyder for full control over the use and deployment of the system within their internal environment.

## About Us

Established in November 2000, and formally known as Engage Solutions Ltd, Geodesic (Hong Kong) Ltd is a Hong Kong-based applications development company specialising in the provision of advanced, investment banking focused customer management and resource alignment systems.

Its principal product is the Spyder Client Alignment and Management System, which it has successfully implemented in several financial institutions within the region. The nature of its clients range from large global brokerages to regional brokerages and fund managers.

In December 2005, Engage Solutions was acquired as a wholly owned subsidiary by Geodesic Limited, a company publicly listed in India (Bombay Stock Exchange and National Stock Exchange of India) with a market capitalisation of approximately US\$400 million. The consolidated Geodesic revenue for 2007/2008 was approximately US\$62 million with a profit of approximately US\$29 million.

Founded in 1999, Geodesic is the creator of the first unified IM platform, Mundu, that aggregates popular IM services viz. MSN, Yahoo, ICQ, AIM, etc. Geodesic has been consistently ranked by Deloitte Touche & Tohmatsu as one of Asia’s fastest growing companies for four years running, with revenue growth doubling year on year.

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For sales, partner alliances and any other queries, please contact us at [spydersales@geodesic.com](mailto:spydersales@geodesic.com) or call us at the following offices:

### Hong Kong Office

Geodesic (Hong Kong) Limited  
3/F, Well View Commercial Building  
10 Morrison Street, Sheung Wan, Hong Kong  
Phone: +852-2815-5667  
Fax: +852-2872-0115

### Headquarters

Geodesic Limited  
B-3, Lunic Industries, Opp. State Bank of India  
MIDC, Andheri (E), Mumbai – 400 093, India  
Phone: +91-22-2831-1849  
+91-22-2830-6804  
+91-22-2830-6837  
+91-22-2831-2872  
Fax: +91-22-2820-0832  
URL: <http://www.geodesic.com>