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Research Information Exchange Markup Language

The report used for this illustration is a mock up of a standard Credit Suisse First Boston Equity Research company report. The fictitious company Oklahoma Energy is covered by analysts Smith, Jones and Fields from the Houston office and published by the main US office in New York. They have recommended a BUY and provided some analytics to support this with discussion of future earnings. The **ProductFocus** is therefore 'Issuer' and the **Subject** is set to 'EarningsReview'. In this illustration the report expires 3 months after publication.

<Source>

This contains information and contact details about the authors of the document and those of the publisher (CSFB). There is only one publisher so there is no ambiguity but **primaryindicator =Yes** is specified to help with efficient searching.

<Content>

ResourceID is using the <name> value due to its' uniqueness, there is no requirement for this to be the name of the resource. The resource (CompanyReportCSFB.pdf) in this example would co-exist with the RIXML metadata file CompanyReport.xml as no path or URI information is supplied.

<Context>

The <Region> element illustrates where the implementers would map internal regions against the RIXML definition, the report uses 'Americas' (top left, page 1) which falls into the RIXML region of 'NorthAmerica'. <SectorIndustry> is implementing the RIXML definition based on GICS. The Action items (**recommendationAction**, **estimateAction** etc.) contain information not captured in the document, instead these items would be generated by comparison to previous data. In this case the RIXML tag **Security TargetpriceAction=Update** informs a reader that the value in the document is a change. **AssetClass**, **AssetType** and **SecurityType** are used at **Security** level and not included at the **Context** level. These packages could exist in both locations and implementers may decide to 'promote' these values to **Context** level to aid searching and ignore the **Security** level but in doing so care should be taken where more than 1 **Issuer** or **Security** package is included as definitions may become ambiguous.

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