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In this issue we welcome MarkLogic as a new Associate member, we highlight an article on Digital Publishing contributed by our Associate member Quark, we highlight recent activity in working groups, instructions on coding vendor-specific entitlement codes, recent and upcoming industry events and get a perspective from Jack Roehrig, Executive Director of RIXML.org.

RIXML.org Welcomes MarkLogic as new Associate Member

We are pleased to announce that MarkLogic, a leading provider of information infrastructure software, has joined RIXML.org as an Associate member.

“Leading financial institutions are increasingly looking to purpose-built databases like MarkLogic to better leverage XML,” said Kenneth Chestnut, Vice President of Product Marketing at MarkLogic Corporation. “Given our heritage as a recognized leader in XML and other open technology standards, MarkLogic is pleased to become a member of RIXML.org. We look forward to working closely with the consortium to help solve major challenges facing the financial services industry today as they respond quickly to changing market conditions and new regulatory requirements.”

MarkLogic provides a robust, highly-scalable platform for XML initiatives within financial institutions. Solutions span multiple areas, from the message-focused infrastructure of the back office, to the document and information applications of the front office.

“RIXML.org welcomes MarkLogic as an associate member. We look forward to leveraging their expertise for the research business and to the RIXML tagging structure in particular”, said Jack Roehrig, Executive Director, RIXML.org.

As an Associate Member, MarkLogic will add much value through direct participation in RIXML Technology working groups, with their fellow associate and steering members, to help develop future releases of the schema.

About MarkLogic Corporation

MarkLogic Corporation is a leading provider of information infrastructure software, serving industries including media, government, financial services, and others. The company’s flagship product, MarkLogic Server, is used by customers to enable a wide variety of information applications including custom publishing, search-based applications, content analytics, unified information access, metadata catalogs, and threat intelligence systems. MarkLogic Server is based on patented innovations and provides state-of-



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Membership

Steering Committee Members

Buy-Side

Fidelity Investments
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Sell-Side

Bank of America
Citi
Credit Suisse
Deutsche Bank
Goldman Sachs
JPMorgan
Merrill Lynch
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UBS

Associate Members

Bloomberg
BlueMatrix
FactSet
Instant Information Inc.
Markit

the-art features including location awareness, real-time search, and a shared-nothing cluster architecture that supports high performance against petabyte-scale databases. MarkLogic is headquartered in San Carlos, California with field offices in New York, Washington, London, Boston, Austin, and Frankfurt. The company is privately held with investors Sequoia Capital and Tenaya Capital. For more information, to download a trial version, or to read the award-winning Kellblog, written by MarkLogic CEO Dave Kellogg, go to www.marklogic.com.

We look forward to our partnership with MarkLogic.

Interested in joining RIXML.org? Call our Program Office and 212-655-2945 or email us at rixml@jandj.org for additional information.

Quark: Digital Publishing Strategy Highlighted at June "Untethered 2010" Conference in New York

Today, live from the "Untethered 2010" conference in New York City, Quark is making two significant announcements. First, we are announcing our digital publishing strategy as part of our dynamic publishing vision, and second, we are announcing partnerships with K-NFB Reading Technology, maker of the Blio eReader, and Baker & Taylor, one of the largest distributors of physical and digital media in the world.

Our announcements come at a time when the consumer market is enchanted with smartphones, buzzing about the iPad, and observing the quick passing of black-and-white electronic books in favor of interactive, multimedia devices. The consumer experience offered by new devices such as the iPad opens up an entirely new market for publishers and other companies, and they are now racing to capitalize on this exciting opportunity. Quark is well positioned through our dynamic publishing vision to show how we can help publishers and others pursue digital publishing through a cost-effective and platform-independent strategy.

The Untethered conference brings together the publishing industry's top influencers to discuss the theme "profitable media in the tablet era." PG Bartlett, our Senior Vice President of Product Management, will be presenting Quark's approach to digital publishing and our first partnership during the morning keynote. PG will accompany senior executives representing The Washington Post Company, NPR, The Washington Post Company, Simon & Schuster, HarperCollins Publishers, and Sony Electronics, and more.

Digital publishing is one of the hottest topics in publishing today. In fact, we already have customers publishing to the iPhone and iPad. Our partnership with K-NFB and Baker & Taylor will provide the first complete digital publishing solution to help customers reduce the cost and complexity of creating and distributing digital content to millions of consumers.

[RIXML.org: Technical & Standards working groups](#)

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 MarkLogic
 Quark
 SNL Financial
 Standard &
 Poor's/Capital IQ
 TheMarkets.com
 Thomson Reuters

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For additional
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 visit www.RIXML.org

As a follow up to our latest quarterly members' meeting, we agreed to form and kick off two technical working groups to take on:

>Prioritizing the build out of our schema---to include deeper tagging sets for Fixed Income, Credit and Ratings related research and any additional tags as needed. Jack Roehrig is the Chair of this working group.

>Looking at dynamic tagging "wrappers" applied to files, given client consumer interests and preferences, as well as any other entitlement related enhancements to the tagging structure. We thank Sara Noble from BlueMatrix as the Chair of this working group.

We will convene these groups over the summer and provide an update at our September quarterly members meeting.

How to Code Vendor-Specific Entitlement Codes From *Best Practices for RIXML Publishing, v. 0.2*, by Alan Francis, FactSet

Most vendors have a way of directing a report to a specific audience (which may be referred to as a user group or distribution group). The audience is assigned a text or numeric code (e.g., NON_US or 12). Each such code should appear within its own distinct AudienceTypeEntitlement element within its own distinct EntitlementGroup element as follows:

```
<EntitlementGroup>
<Entitlement includeExcludeIndicator="Include" primaryIndicator="Yes">
<AudienceTypeEntitlement
audienceType="PublisherDefined">BBGCODE1 </AudienceTypeEntitlement>
</Entitlement>
</EntitlementGroup>
<EntitlementGroup>
<Entitlement includeExcludeIndicator="Include" primaryIndicator="Yes">
<AudienceTypeEntitlement
audienceType="PublisherDefined">REUTERS5 </AudienceTypeEntitlement>
</Entitlement>
</EntitlementGroup>
```

Note that RIXML 2.3 enables you to associate entitlement codes with a particular vendor.

RIXML.org Industry Recent & Upcoming Events

Blue Matrix Fifth Research Roundtable, June 3rd 2010, New York

We wish to acknowledge and thank Skye Hauptman, Patricia Horotan and their team at Blue Matrix for including our organization in their Fifth Research Roundtable, held on June 3rd, at the Crosby Street Hotel in New York. There was excellent attendance and participation. Jack Roehrig participated on a panel, along with Art Hogan from Jefferies, to discuss trends in the Research Industry.

Investorside.org Community Event, September 23rd, 2010

Jack Roehrig, along with Sara Noble from BlueMatrix, will participate in a panel discussion entitled "Latest Advances in Research Distribution Technology" at the upcoming Investorside.org Community Event, on September 23rd, to be held at the Yale Club in New York.

Perspective from Jack Roehrig, Executive Director, RIXML.org

PLEASE NOTE: This viewpoint is entirely my own and *neither* the official viewpoint of RIXML.org *nor* the viewpoint of any of its member organizations.

I have seen the future....and that was then.

I would think there are relatively few people that work in our industry today that were also working in our industry in 1970. I mention that year specifically since it relates to the year that Alvin Toffler coined the term and authored the book of the same name, **Future Shock**.

Now marking its 40th anniversary year, Toffler's book grew out of an article "The Future as a Way of Life" in Horizon magazine, Summer 1965 issue. The book has sold over 6 million copies and has been widely translated. As per Wikipedia, Future Shock is also a term for a certain psychological state of individuals and entire societies, introduced by Toffler in his book of the same name, Toffler's shortest definition of future shock is a personal perception of "too much change in too short a period of time".

Toffler argues that society is undergoing an enormous structural change, a revolution from an industrial society to a "super-industrial society". This change will overwhelm people, the accelerated rate of technological and social change leaving them disconnected and suffering from "shattering stress and disorientation"—future shock. Toffler stated that the majority of social problems were symptoms of the future shock. In his discussion of the components of such shock, he also popularized the term **information overload**.

Wow-----pretty deep stuff----and certainly breakthrough thinking at the time. It is interesting to examine RIXML.org in this context(not to get too deep). RIXML.org was born out of need to bring some order out of the chaos of unstructured(untagged) research content to institutional consumers----many of us still refer to the issue of *information overload* that exists today---considering this was an issue *prior* to the days of affordable computer technology for the consumer, the World Wide Web and pervasive PDAs, the information overload issue has only greatly intensified since.

So....in some small way(perhaps very small), I like to think that our organization, through enhanced dialog to produce better structure around research, and through idea exchange to achieve a greater good and to encourage creative solutions, can help to soften Future Shock.....or at least try.

Thanks to Alvin Toffler for his wisdom and foresight....and thanks to all of YOU, our members, for **YOUR COMMITMENT**.

I hope your summer has been enjoyable.

Many Thanks.

**"There were so many fewer questions, when stars, were still
just the holes to heaven."**

- Jack Johnson

