

# S&P Global enhances Capital IQ Pro desktop with acquisition of ChartIQ

Addition of Chart IQ to S&P Global Market Intelligence strengthens data visualization and advanced charting capabilities

NEW YORK, Jan. 5, 2023 /PRNewswire/ -- S&P Global (NYSE: SPGI), provider of credit ratings, benchmarks and analytics, has announced the acquisition of ChartIQ, a premier charting provider for the financial services industry. The acquisition will form part of the S&P Global Market Intelligence (Market Intelligence) division and further enhance its flagship S&P Capital IQ Pro platform, its digital investment solutions provider Markit Digital and other workflow solutions to provide the industry with leading visualization capabilities.

"The addition of ChartIQ to our S&P Capital IQ Pro platform brings together comprehensive data and workflow with compelling analytical capabilities and advanced charting," said Warren Breakstone, Head of Desktop and Channel Solutions at S&P Global Market Intelligence. "As we continue to add and expand our data coverage in public and private markets, and across asset classes, clients will now also benefit from the leading charting solution to unlock new opportunities and insights from this data. I am delighted to welcome the ChartIQ employees to the S&P Global team."

**S&P Global**  
Market Intelligence

ChartIQ is a professional grade charting solution that allows users to visualize data with a fully interactive web-based library that works seamlessly across web, mobile and desktop. It provides advanced capabilities including trade visualization, options analytics, technical analysis and more. Additionally, ChartIQ allows clients to visualize vendor-supplied data combined with their own proprietary content, alternative datasets or analytics.

"For over a decade, ChartIQ has been recognized as the financial industry's leading data visualization tool. By joining S&P Global Market Intelligence, ChartIQ will expand its reach to hundreds of thousands of users of Capital IQ Pro and thousands of clients of S&P Global's Datafeeds and Markit Digital solutions," said Dan Schleifer, CEO and Co-Founder of Cosaic. "ChartIQ clients will benefit from the expansive portfolio of data sets which can enrich their analytical processes."

S&P Global will continue to license the ChartIQ charting packages on a standalone basis and as part of integrated solutions. More information about ChartIQ can be found on the [S&P Global Marketplace](#).

Prior to this transaction, ChartIQ was part of Cosaic, a workflow solution provider that brings data visualization and smart desktop technology to the financial services industry. The transaction was signed on December 23, 2022 and closed on January 1, 2023. The financial terms of the transaction were not disclosed.

**Forward-Looking Statements:** This press release contains "forward-looking statements," as defined in the Private Securities Litigation Reform Act of 1995. These statements, including statements about COVID-19 and the completed merger (the "Merger") between a subsidiary of S&P Global Inc. (the "Company") and IHS Markit Ltd. ("IHS Markit"), which express management's current views concerning future events, trends, contingencies or results, appear at various places in this press release and use words like "anticipate," "assume," "believe," "continue," "estimate," "expect," "forecast," "future," "intend," "plan," "potential," "predict," "project," "strategy," "target" and similar terms, and future or conditional tense verbs like "could," "may," "might," "should," "will" and "would." For example, management may use forward-looking statements when addressing topics such as: the outcome of contingencies; future actions by regulators; changes in the Company's business strategies and methods of generating revenue; the development and performance of the Company's services and products; the expected impact of acquisitions and dispositions; the Company's effective tax rates; and the Company's cost structure, dividend policy, cash flows or liquidity.

Forward-looking statements are subject to inherent risks and uncertainties. Factors that could cause actual results to differ materially from those expressed or implied in forward-looking statements include, among other things:

- the impact of the acquisition of ChartIQ, including the impact on the Company's results of operations; any

failure to successfully integrate the acquired departments into the Company's operations; and any failure to attract and retain key employees;

- the risk of litigation, unexpected costs, charges or expenses relating to the acquisition;
- worldwide economic, financial, political, and regulatory conditions, and factors that contribute to uncertainty and volatility, natural and man-made disasters, civil unrest, pandemics (e.g., COVID-19), geopolitical uncertainty (including military conflict), and conditions that may result from legislative, regulatory, trade and policy changes;
- the ability of the Company to retain customers and to implement its plans, forecasts and other expectations with respect to IHS Markit's business and realize expected synergies;
- business disruption following the Merger;
- the Company's ability to meet expectations regarding the accounting and tax treatments of the Merger;
- the health of debt and equity markets, including credit quality and spreads, the level of liquidity and future debt issuances, demand for investment products that track indices and assessments and trading volumes of certain exchange-traded derivatives;
- the demand and market for credit ratings in and across the sectors and geographies where the Company operates;
- the Company's ability to successfully recover should it experience a disaster or other business continuity problem from a hurricane, flood, earthquake, terrorist attack, pandemic, security breach, cyber attack, data breach, power loss, telecommunications failure or other natural or man-made event, including the ability to function remotely during long-term disruptions such as the ongoing COVID-19 pandemic;
- the Company's ability to maintain adequate physical, technical and administrative safeguards to protect the security of confidential information and data, and the potential for a system or network disruption that results in regulatory penalties and remedial costs or improper disclosure of confidential information or data;
- the outcome of litigation, government and regulatory proceedings, investigations and inquiries;
- concerns in the marketplace affecting the Company's credibility or otherwise affecting market perceptions of the integrity or utility of independent credit ratings, benchmarks and indices;
- the effect of competitive products and pricing, including the level of success of new product developments and global expansion;
- the Company's exposure to potential criminal sanctions or civil penalties for noncompliance with foreign and U.S. laws and regulations that are applicable in the domestic and international jurisdictions in which it operates, including sanctions laws relating to countries such as Iran, Russia, Sudan, Syria and Venezuela, anti-corruption laws such as the U.S. Foreign Corrupt Practices Act and the U.K. Bribery Act of 2010, and local laws prohibiting corrupt payments to government officials, as well as import and export restrictions;
- the continuously evolving regulatory environment, in Europe, the United States and elsewhere around the globe, affecting S&P Global Market Intelligence, S&P Global Ratings, S&P Global Commodity Insights, S&P Global Mobility, S&P Dow Jones Indices, S&P Global Engineering Solutions, and the products those business divisions offer including our ESG products, and the Company's compliance therewith;
- the Company's ability to make acquisitions and dispositions and successfully integrate the businesses we acquire;
- consolidation in the Company's end-customer markets;
- the introduction of competing products or technologies by other companies;
- the impact of customer cost-cutting pressures, including in the financial services industry and the commodities markets;
- a decline in the demand for credit risk management tools by financial institutions;
- the level of merger and acquisition activity in the United States and abroad;
- the volatility and health of the energy and commodities markets;
- our ability to attract, incentivize and retain key employees, especially in today's competitive business environment;
- the level of the Company's future cash flows and capital investments;
- the impact on the Company's revenue and net income caused by fluctuations in foreign currency exchange rates;
- the Company's ability to adjust to changes in European and United Kingdom markets as the United Kingdom leaves the European Union, and the impact of the United Kingdom's departure on our credit rating activities and other offerings in the European Union and United Kingdom; and
- the impact of changes in applicable tax or accounting requirements on the Company.

The factors noted above are not exhaustive. The Company and its subsidiaries operate in a dynamic business environment in which new risks emerge frequently. Accordingly, the Company cautions readers not to place undue reliance on any forward-looking statements, which speak only as of the dates on which they are made. The Company undertakes no obligation to update or revise any forward-looking statement to reflect events or

circumstances arising after the date on which it is made, except as required by applicable law. More detailed information about factors that may affect our performance may be found in our filings with the Securities and Exchange Commission, including our most recent Annual Report on Form 10-K and Item 1A, Risk Factors, in our most recently filed Annual Report on Form 10-Q, which can be obtained at its website at <http://www.sec.gov>. We undertake no obligation to publicly update any forward-looking statements, whether as a result of new information, future events or otherwise.

### **About S&P Global Market Intelligence**

At S&P Global Market Intelligence, we understand the importance of accurate, deep and insightful information. We integrate financial and industry data, research and news into tools that help track performance, generate alpha, identify investment ideas, perform valuations and assess credit risk. Investment professionals, government agencies, corporations and universities around the world use this essential intelligence to make business and financial decisions with conviction.

S&P Global Market Intelligence is a division of S&P Global (NYSE: SPGI), the world's foremost provider of credit ratings, benchmarks and analytics in the global capital and commodity markets, offering ESG solutions, deep data and insights on critical business factors. S&P Global has been providing essential intelligence that unlocks opportunity, fosters growth and accelerates progress for more than 160 years. For more information, visit [www.spglobal.com/marketintelligence](http://www.spglobal.com/marketintelligence).

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