IPRO 303: Podcasting, Market Research and Multimedia Pilots for Calamos Investments, LLC
IPRO 303: Introduction
**IPRO 303: Three Operational Units Working Together to Solve the Problem**
RESEARCH OBJECTIVE

Research and Analyze the Affluent Market:

• Global and U.S.
• Preferences for Financial Services Communication
• Adoption of Technology for Communication
SEGMENTING THE AFFLUENT

• Mass Affluent or Emerging Affluent
  $100,000 to $1 million in investable assets

• High Net Worth
  $1 million+ in investable assets

• Penta-Millionaires
  $5 million+ in investable assets

• Ultra High Net Worth
  $10 million+ in investable assets
1. What is your age?
   _20-30 _30-40 _40-50 _50-60 _60-70 _70+

2. For how long have you been accessing the internet?
   _under 1 year _1-2 years _2-4 years _5+ years

3. How often do you check on the status of your personal investments (Calamos or otherwise)?
   _Daily _Weekly _Monthly _Quarterly _Yearly

4. Which technologies do you use on a weekly basis?
   _Email _Streaming Web Video _Streaming Web Audio
   _Blackberry _iPod _Cell Phone Text Messaging
   _Mobile Web Browsing _Instant Messaging

5. What is your primary source of news?
   _Daily Paper _Radio _Television _Internet
RESEARCH METHODS: SECONDARY RESEARCH
KEY INSIGHTS FROM MARKET RESEARCH

- The Affluent and Their Technology Adoption
- Convergence of Media and Technology
MARKET RESEARCH & ANALYSIS

- Contribution to IPRO Sub Teams Content & Technology

- Contribution to Calamos Investments
Competitor Benchmarking

• 20 firms
• 4 months
• 4 categories

Merrill Lynch
Schwab
Fisher
Pimco Bonds
Lazard
American Century Investments
Fidelity
Legg Mason
Bear Stearns
Knight Capital Group
Friedman Billings Ramsey
Gabelli Asset Management
Alliance Bernstein
Waddell & Reed
Century Funds
US Global Investors
Nuveen
Neuberger Berman
Dodge & Cox Funds

CALAMOS INVESTMENTS
Content Generation: Content Focus Area

Number of Participating Companies (of 20 surveyed)

- Product: 18
- Company: 16
- Event: 14
- Market Opinion: 13
- General News: 10
Content Generation: Content Formats

Number of Participating Companies (of 20 surveyed)

- Text (HTML) (18)
- Text (PDF) (6)
- Podcast (2)
- Audio Stream (4)
- Audio Download (5)
- Video Stream (5)
- Video Download (1)

IPRO 303 - Podcasting, Market Research and Pilots for Calamos Investments
CONTENT ANALYSIS SUB-TEAM
Content Generation: Update Frequency

Number of Participating Companies (of 20 surveyed)

- Daily: 4
- Weekly: 10
- Monthly: 14
- Quarterly: 18
- N/A: 0
Top 5 “Content-Committed” Companies

• American Century Investments
• Bear Stearns Asset Management
• Merrill Lynch
• Neuberger Berman
• US Global Investors

…4 of the 5 offer Podcasting.
Suggested Content

• Tier 1: Welcoming Kit
• Tier 2: Online media (Podcasting or VideoBlog)
• Tier 3: Cell Phone applications
Technology Sub-Team: Exploring, Explaining and Creating the Technology

Customer Data Sub-Team Inputs

Technology Sub-Team Inputs

Content Sub-Team Inputs

Primary Output: Technology Pilots
Two Directions of Development

- Branded Mobile Applications
- Content for Media Players

Specific Platforms Picked with help of other sub-teams
Branded Mobile Applications

Technology Sub Team: Branded Applications Group

Custom Applications for Cell Phones – RSS Feeds via a branded RSS reader

Target Platform: RIMM Blackberry – Leading Smartphone
Technology Sub Team: Content for Media Players

Target Platform: Apple iPod – The Leading Media Player
Technology Sub Team: Content for Media Players

Content Concepts – iPod ready **Voice Content** for audio only users, drivers or joggers.
Technology Sub Team: Content for Media Players

Content Concepts – iPod ready Enhanced Content for midrange users…

Photos…
Events…
Alerts…
And Slides from Conference Calls!
Technology Sub Team: Content for Media Players

Content Concepts – iPod ready Video Content for video iPod and next generation users…
Two Directions of Development
One theme for next generation
Calamos Pilots:

The Voice, The Vision and the Innovation of John and Nick Calamos.
Recent Commentary

January 2006 Commentaries:

2006 Market Outlook and Portfolio Manager Q&A: Entering 2006, Calamos continues to find many positive influences on the economy and financial markets.

Outlooks also available for the following:

- **Stock Market**: Calamos sees the mid-phase of the economic cycle creating attractive opportunities in growth stocks
- **High Yield Bond Market**: Calamos focuses on issues that may benefit from M&A activity and equity issuance stemming from the current economic expansion
- **Convertible Bond Market**: The Calamos team views the convertible market as undervalued and an investment opportunity
- **Global Equity and Convertible Market**: Calamos continues to focus on areas of the world that are embracing pro-growth, free market principles
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For more than 25 years, the Private Client Group at Calamos Investments has helped investors reach their long-term financial objectives. Now the vision, voice and innovation of John P. Calamos, Sr., Nick P. Calamos and the Calamos Private Client Group Team is available wherever you go!

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Branded Applications Goal(s): Easy Content Delivery, High Compatibility, Low TCO

OTA Applet & Internet Feed  

Ready to Use Media
Welcome to the CalamosMobile Channel:
Get started with Calamos Connects for your Blackberry by your mobile E-mail Address:

Submit
www.calamos.com/connects/mobilece.jad

One Click OTA Install

cHTML
Calamos Mobile Channel

[Demo]
Media Player Goal: Easy Content Delivery

Internet Feed → iTunes or CalamosDirect → Ready to Play Media
Calamos Enhanced Channel
Calamos Video Channel
A Complete Package of Solutions:

• Welcoming Kit
• Cell Phone application
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