

IPRO

IPRO 303 - Podcasting, Market Research and Pilots for Calamos Investments
INTERPROFESSIONAL PROJECTS PROGRAM

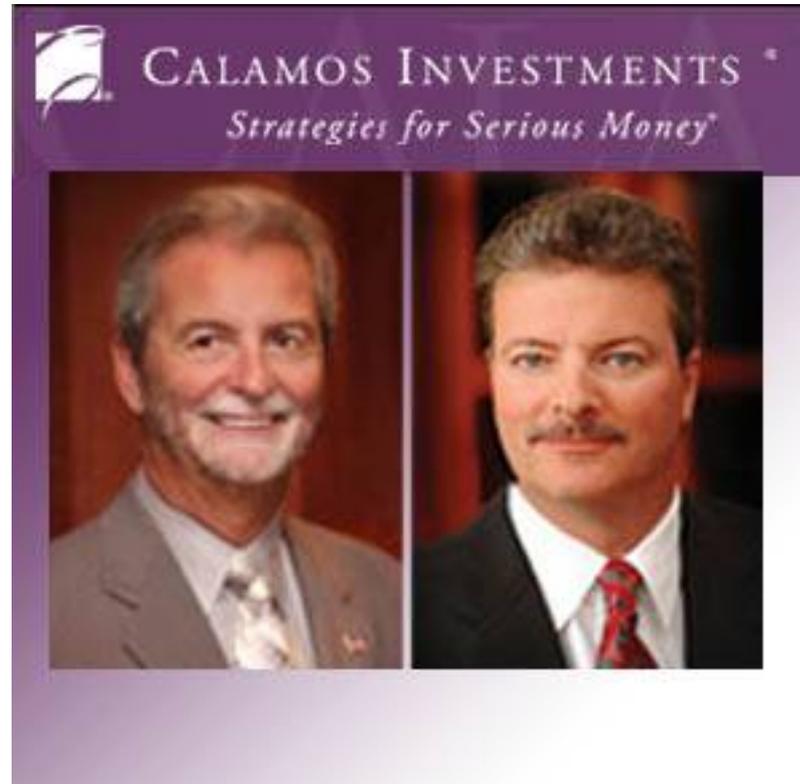
IPRO 303:

Podcasting, Market Research and Multimedia Pilots for Calamos Investments, LLC

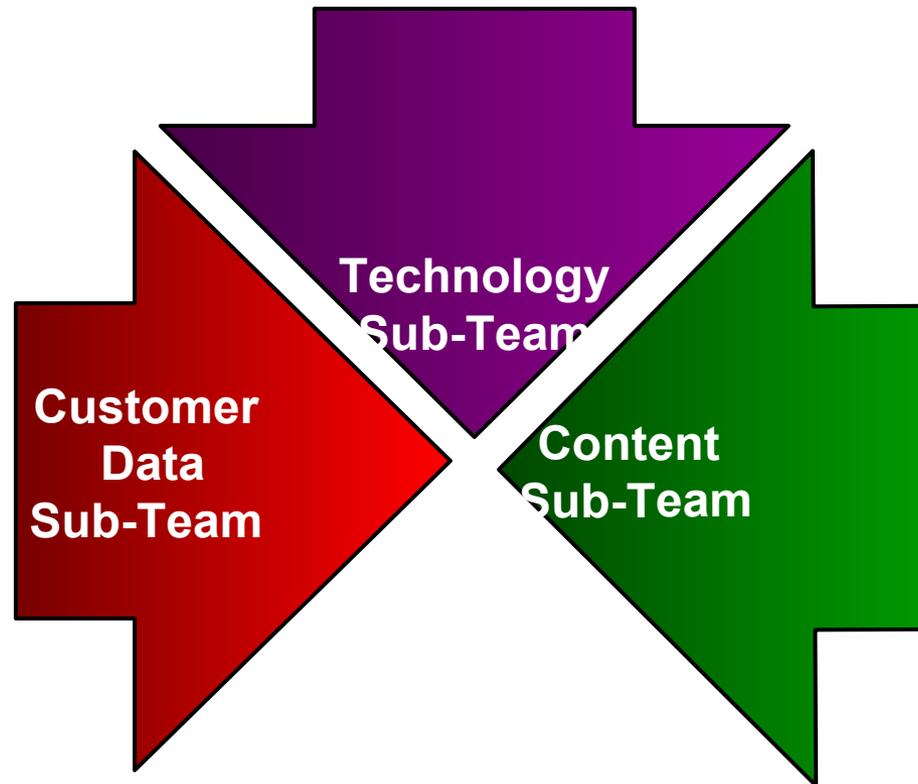


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IPRO 303: Introduction



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



RESEARCH METHODS: PRIMARY RESEARCH

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

Survey prototype

RESEARCH METHODS: SECONDARY RESEARCH



IBM 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

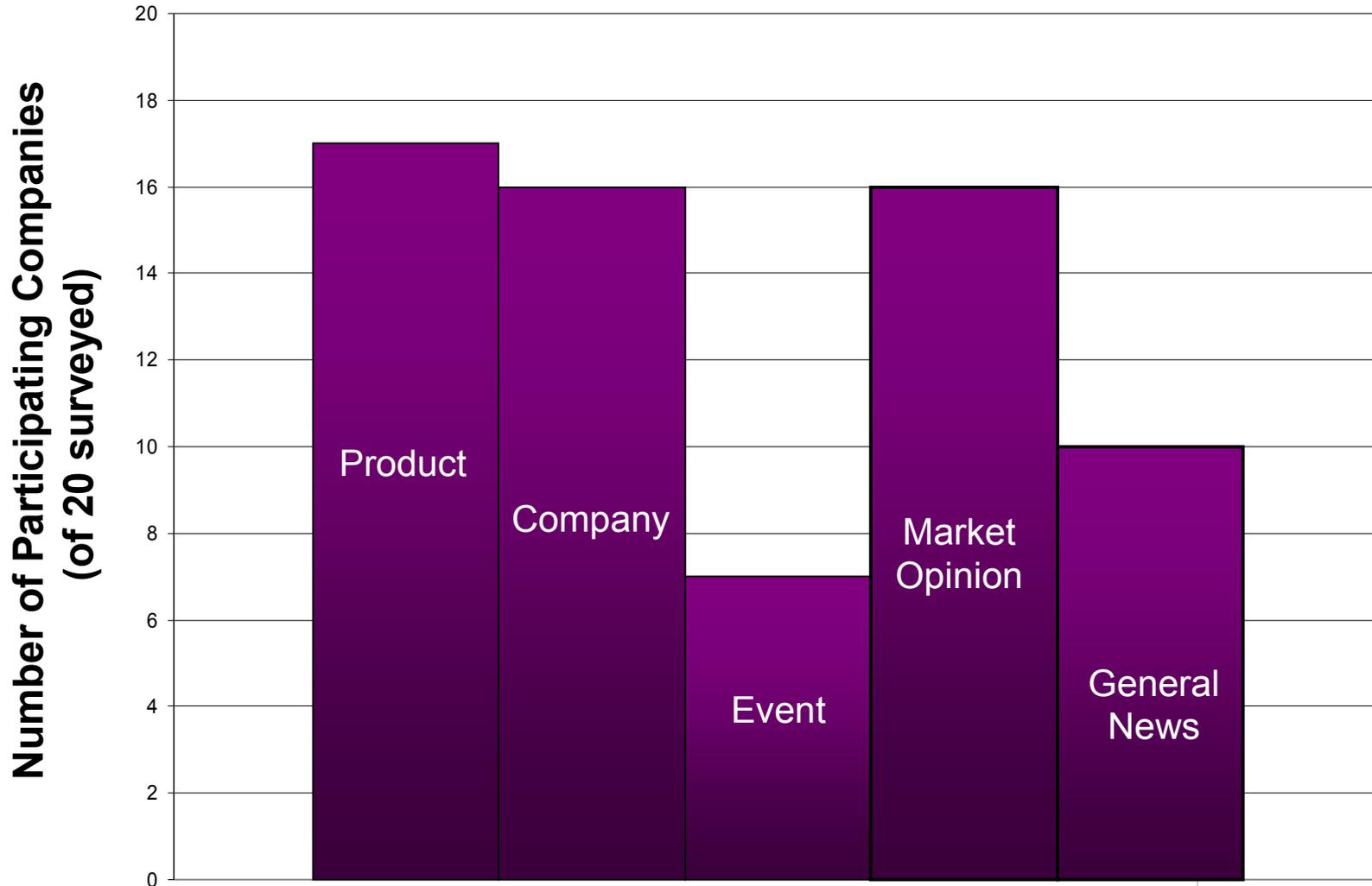
- 20 firms
- 4 months
- 4 categories

- 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

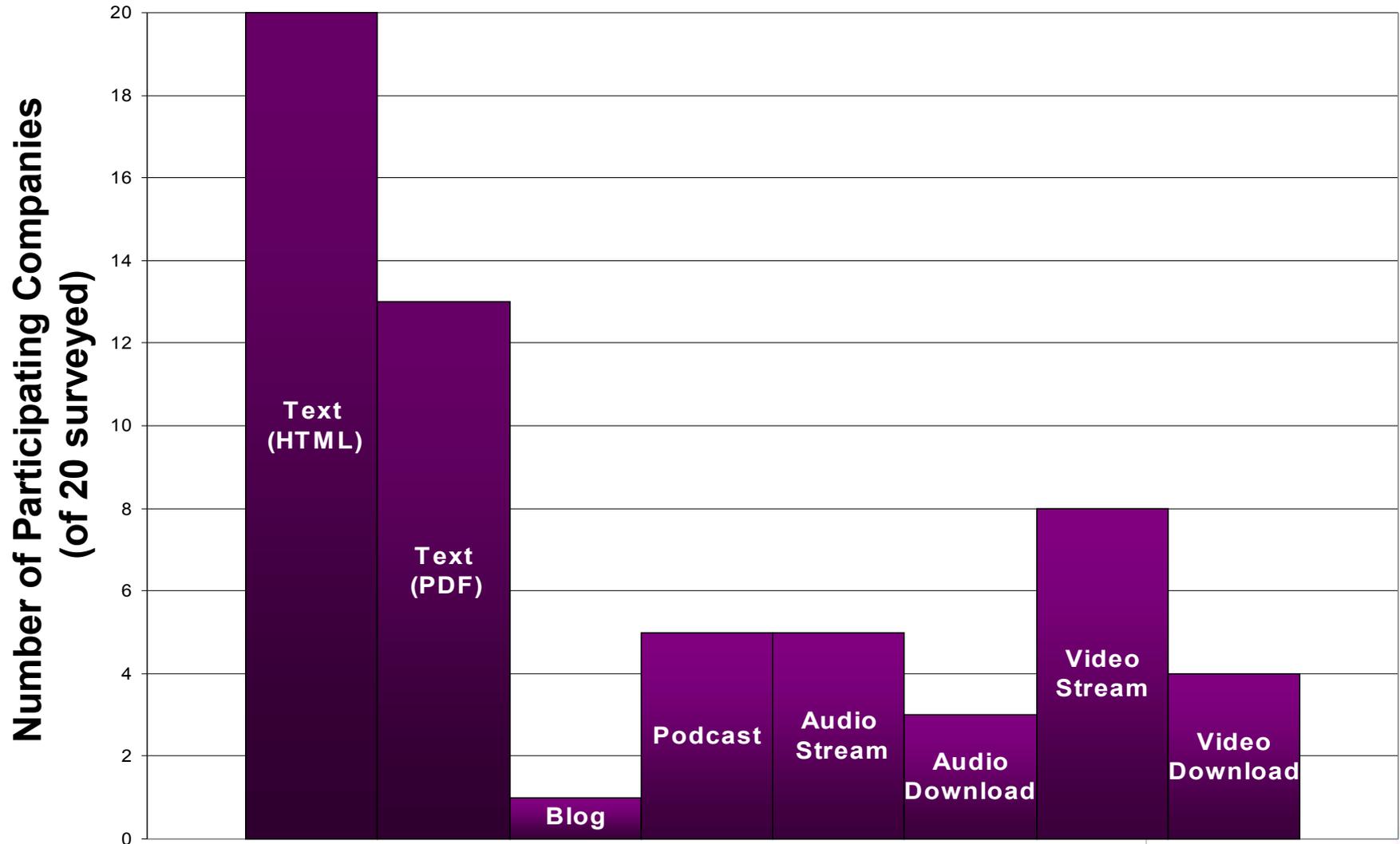
CALAMOS INVESTMENTS



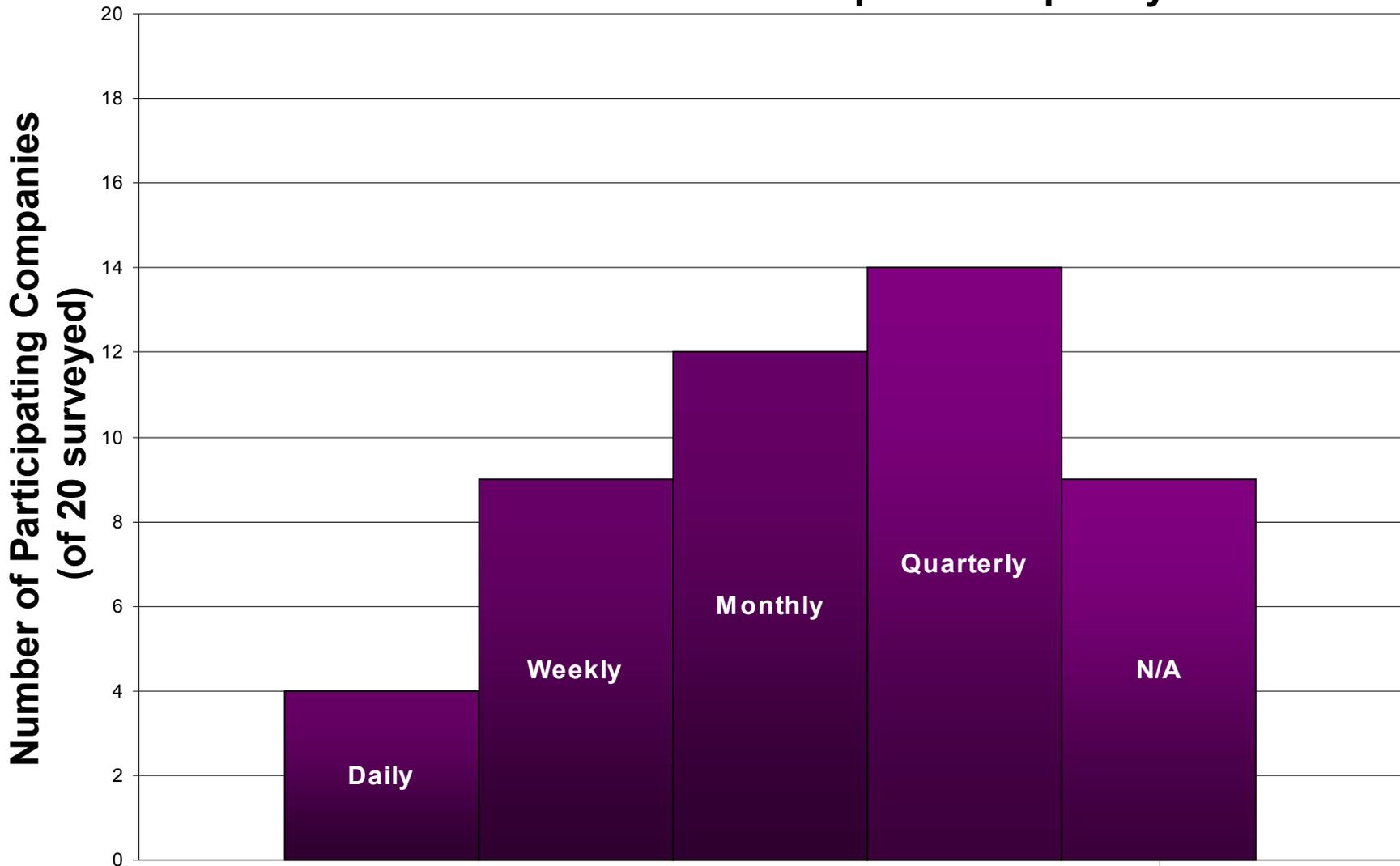
Content Generation: Content Focus Area



Content Generation: Content Formats



Content Generation: Update Frequency



Top 5 “Content-Committed” Companies

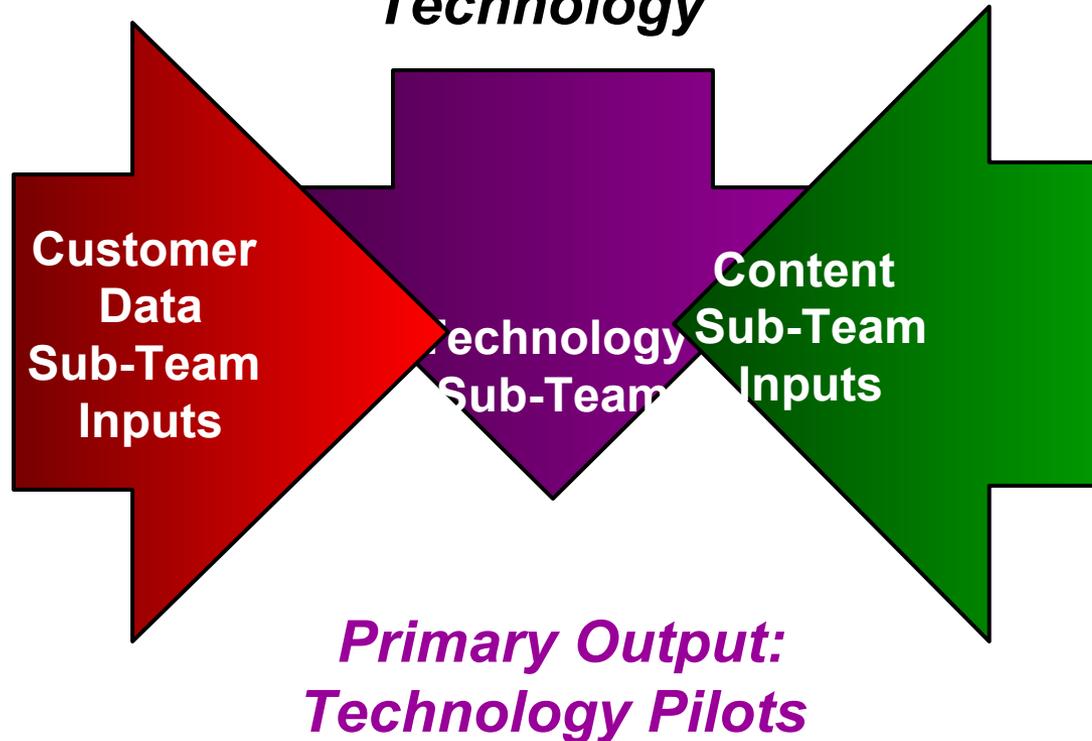
- American Century Investments
- Bear Stearns Asset Management
- Merrill Lynch
- Neuberger Berman
- US Global Investors

.... 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***



Two Directions of Development



Specific Platforms Picked with help of other sub-teams



Calamos



Technology Sub Team: Branded Applications Group

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

Target Platform:
RIMM Blackberry – Leading
Smartphone

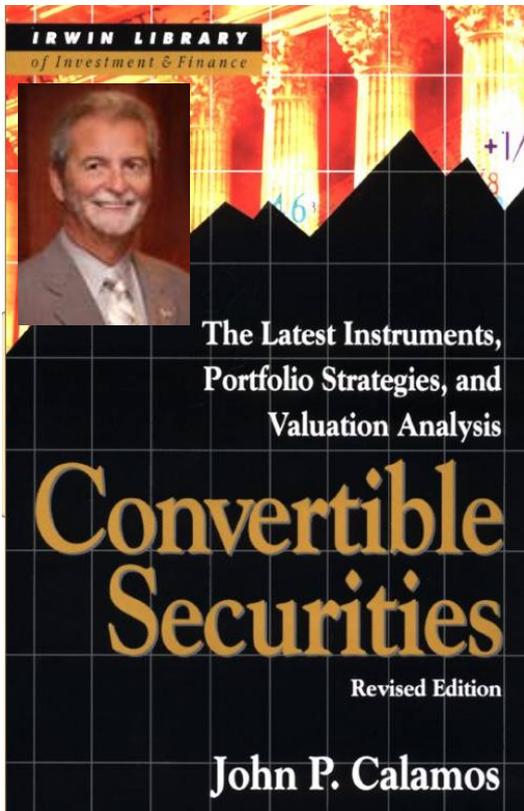
Branded
Mobile
Applications

Technology Sub Team: Content for Media Players

Target Platform:
Apple iPod – The Leading
Media Player



**Content for
Media
Players**



**Technology Sub Team:
Content for Media Players**

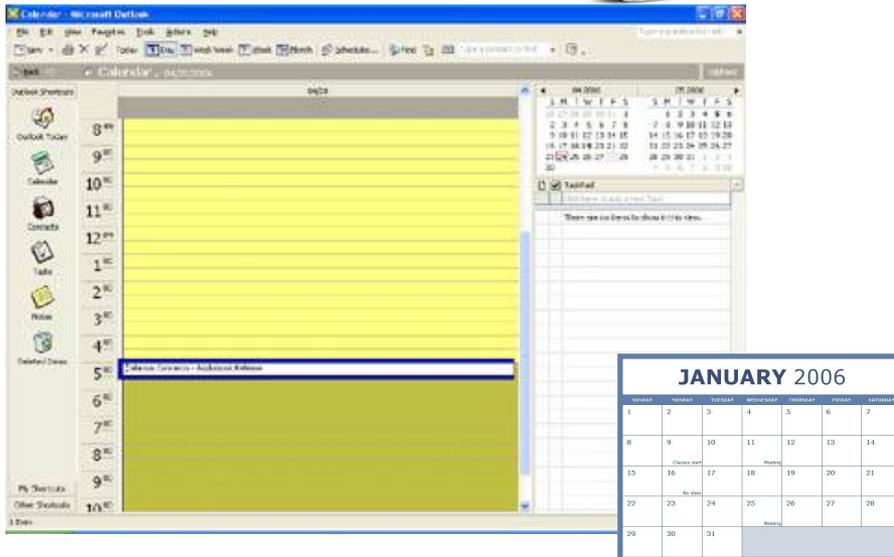
Content Concepts – iPod ready **Voice Content** for audio only users, drivers or joggers.





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.***



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Closed-End Funds

[View Closed-End Funds Recent Annual Shareholder Meeting Update](#)

[CALAMOS Closed-End Funds \(CHI, CHY, CSQ, CGO\) Announce Regular Monthly Distributions](#)

[Effective 3/31/06, Calamos Strategic Total Return Fund Expands Accessibility with a](#)

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



[archive>>](#)

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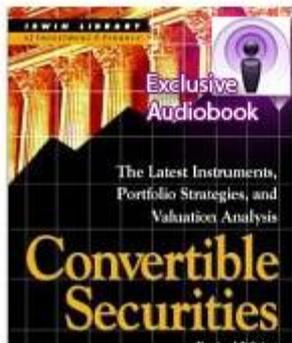


Private Client Group Center



Driving directions to our new headquarters

New@CALAMOS.COM



CALAMOS CONNECTS

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!

[more >>](#)

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Spotlight

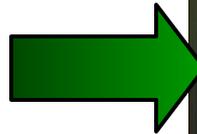
Market Data



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



OTA Applet
& Internet Feed



Ready to Use Media



CALAMOS CONNECTS

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

Submit



CALAMOS CONNECTS

www.calamos.com/connects/mobilece.jad



**One Click
OTA Install**



cHTML



CALAMOS CONNECTS

CalamosMobile Channel



[Demo]

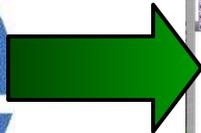


Media Player Goal: Easy Content Delivery

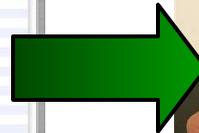
CalamosVoice
CalamosEn
CalamosVideo



Internet Feed



iTunes or CalamosDirect



Ready to Play Media



CALAMOS CONNECTS

CalamosVoice Channel





CALAMOS CONNECTS

CalamosEnhanced Channel





CALAMOS CONNECTS

CalamosEnhanced Channel





CALAMOS CONNECTS

CalamosVideo Channel





Now Playing



MENU



A Complete Package of Solutions:

- Welcoming Kit
- Cell Phone application



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