



Wealth
Management



RBC Wealth Management Online

Questions? We're here to help – contact our Helpdesk at 1-888-820-8006, or contact your Investment Advisor team.

Get RBC Insight research

Through the RBC Insight website, you can quickly and easily access exclusive research reports from various sources within RBC, including RBC Capital Markets, RBC Economics and RBC PH&N Investment Management.

Accessing RBC Insight

1. Once access has been granted to RBC Insight, you can access it by clicking “Markets & Research” (1) on the left-hand navigation menu and selecting “Research & Commentary” (2). Next, click “enter” (3).

The screenshot displays the RBC Wealth Management online interface. On the left, a navigation menu is visible with the following items: Home Page, Portfolio, Transfer Funds, Markets & Research (highlighted with a blue circle containing the number 1), Market Overview, Market News, Research & Commentary (highlighted with a blue circle containing the number 2), Sectors & Industries, Watchlists, Symbol Search, Messages, and Documents. The main content area is titled "Research And Commentary" and features a "Research Centre" section. This section includes a yellow star icon, the text "RBC Insight", and a sub-header "Your gateway to capital markets research and economics reports from RBC." Below this, there is a blue button labeled "Enter" (highlighted with a blue circle containing the number 3). Further down, there is a "Daily" section with a sub-header "Global Insight May 15, 2020" and a sub-text "Today's financial market highlights and the latest research." At the bottom, there is a "Previous Reports" section with a list of dates: Jan 23, 2020, Jan 14, 2020, Jan 01, 2020, Dec 20, 2019, Dec 19, 2019, and Dec 18, 2019.

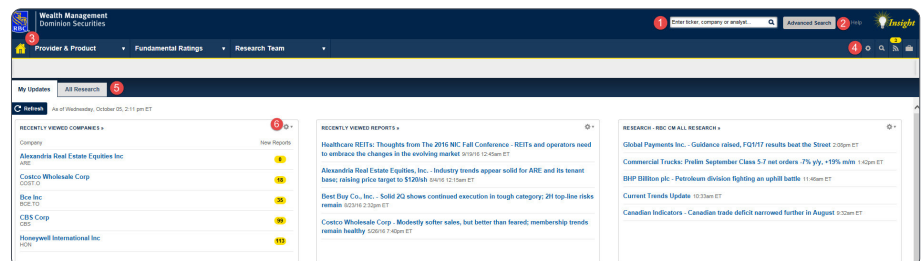
RBC Insight features

From RBC Insight's homepage, the help menu provides a great overview of the features of RBC Insight.

Homepage

The RBC Insight home page displays the following information and options:

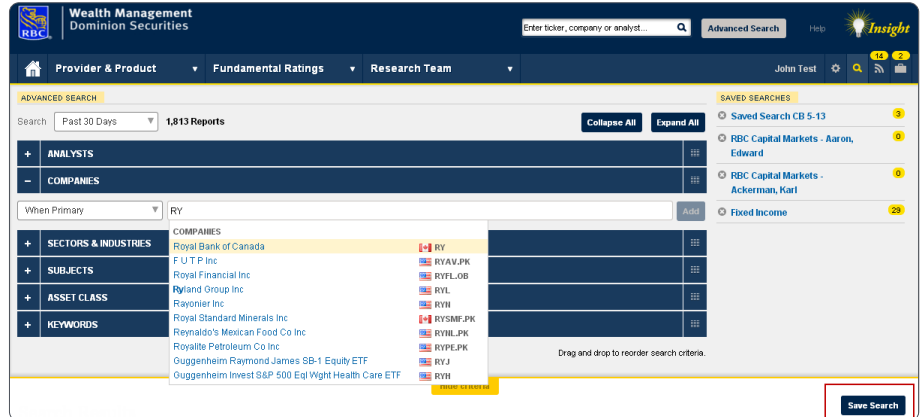
1. **Quick Search/Advanced Search:** Type in a symbol, company name and analyst name for a quick list of results. For more detailed search queries, use Advanced Search.
2. **Help:** Links to an RBC Insight information page.
3. **Top Navigation (Part 1):** Links to the RBC Insight Home Page as well as other menus such as "Provider & Product," "Fundamental Ratings" and "Research Team."
4. **Top Navigation (Part 2):** Access your preferences (⚙️), saved searches (🔍), subscriptions (📄) and briefcase (👛).
5. **My Updates/All Research:** The "My Updates" tab allows you to customize what you see on your homepage while the "All Research" tab allows you see the most recent research from all providers as they are published.
6. **Modules:** You can customize your modules by clicking on the cog icon. You can select from pre-defined modules or you can create one yourself.



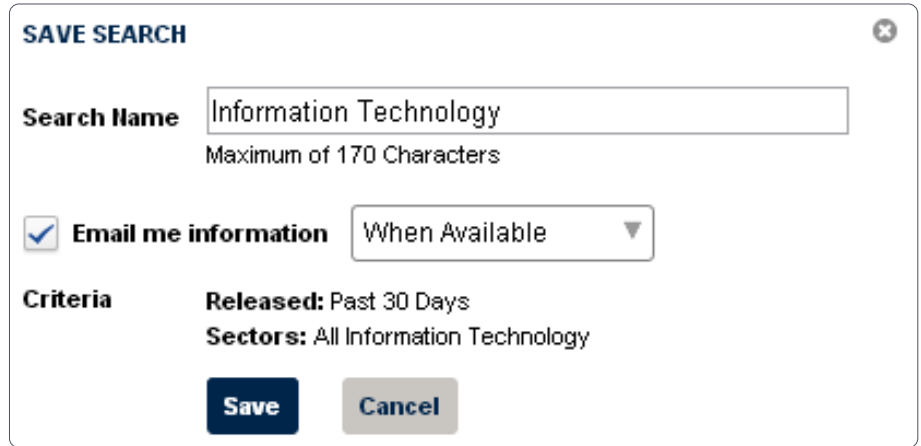
Saved searches

You are able to save your advanced searches for easy use in future sessions. Here's how you can do it:

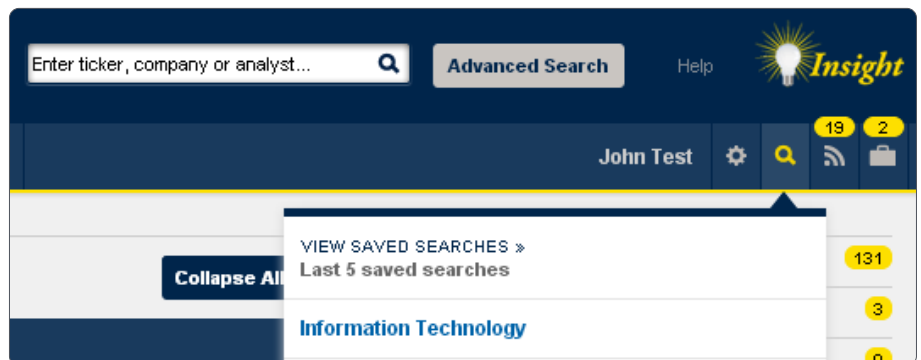
1. From the top of your screen, click on the "Advanced Search" link.
2. Set your search criteria according to your preferences.



3. When you click on "Save Search" at the bottom of the page, you will be asked to name your search. You can also set up an e-mail alert with the frequency that you prefer.



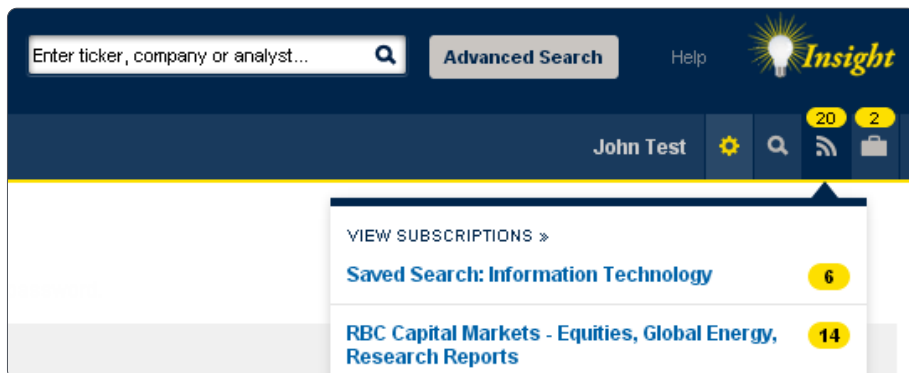
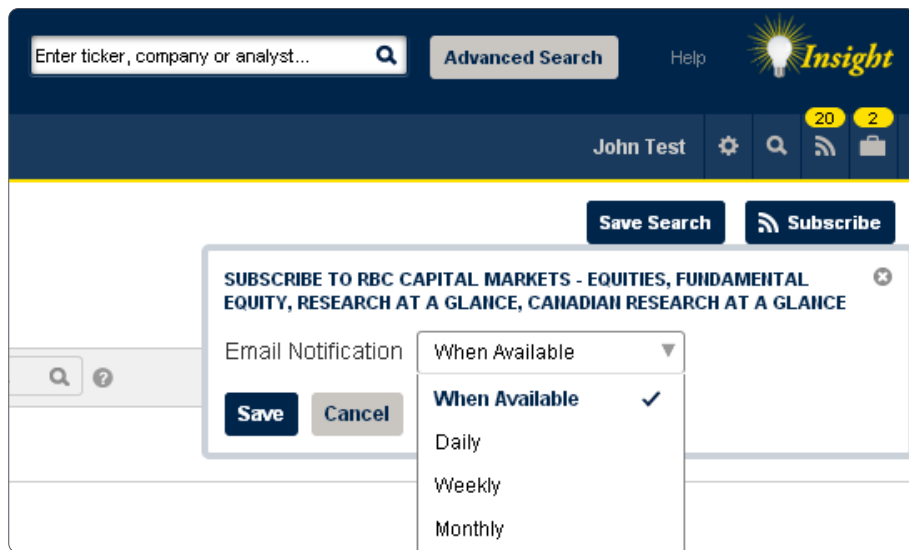
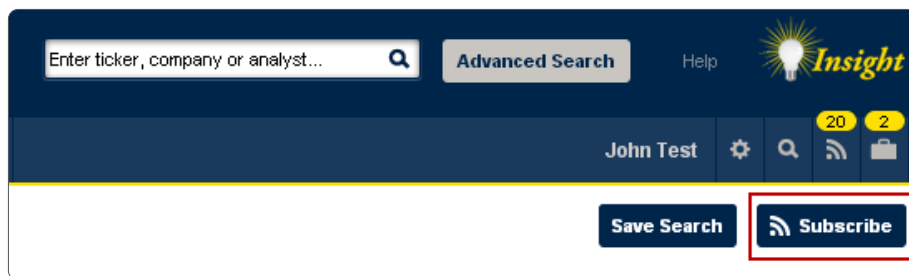
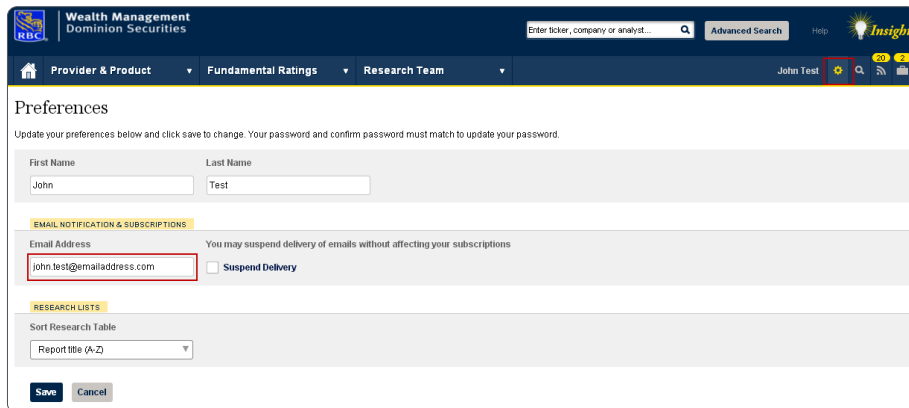
4. Once your search has been saved, you can retrieve it from the "Saved Searches" menu at the top of each page.



Subscription/email alerts

RBC Insight allows you to subscribe to alerts that will send you an e-mail notification as reports are published. The notifications can be sent daily, weekly, monthly or when available. Here’s how you can do it:

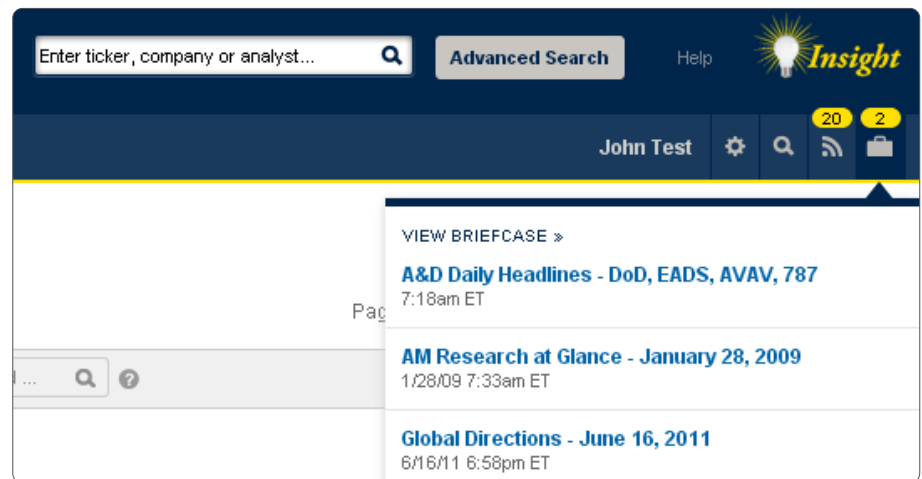
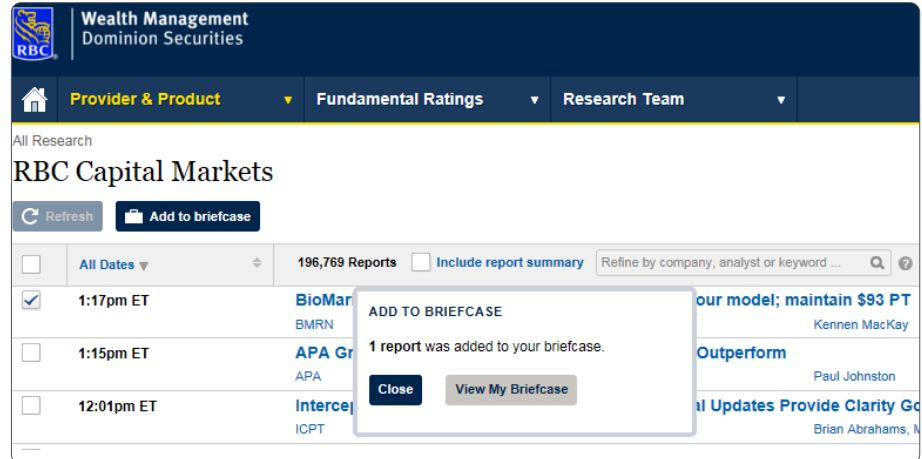
1. Add your email address via the “Preferences” page.
2. After finding a report, company or sector, a “Subscribe” option will be available on the right side of your screen.
3. You will be asked to select the frequency of e-mail alerts.
4. Once your alert is completed, you will be able to retrieve it from the “Subscriptions” menu at the top of each page.



Briefcase

The “Briefcase” allows you to conveniently access reports that are important to you from any page within the RBC Insight tool. Here’s how you can do it:

1. At the top of report lists, you will see the “Save to Briefcase” option. Check the box next to the report that you wish to add to your Briefcase and click on “Save to Briefcase”.
2. You will then see confirmation that the report has been added to your “Briefcase.”
3. You will be able to retrieve your saved documents from the “Briefcase” menu at the top of each page.



Fundamental ratings

The “Fundamental Ratings” section gives you the complete list of companies with a particular rating.

1. Hover over the “Fundamental Ratings” menu from the top level navigation. Then hover over “RBC Capital Markets” and click on the rating you’d like to see listed.



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Note: You must have Adobe Acrobat Reader installed to view PDF reports.

