

GLOBAL BY NATURE,
ENGAGING BY DESIGN



UNLOCK A WORLD OF POTENTIAL

CUT THROUGH THE COMPLEXITY OF GLOBAL COMPENSATION PLAN MANAGEMENT

In today's connected world, compensation plans need to engage employees effectively across borders. That means overcoming the complexities of multiple legislative and tax frameworks as well as languages, currencies and time zones. Equatex provides solutions that cut through these headaches and free you to deliver engaging plans for your people, wherever they may be.

Today, we support and work with over 200 international companies and more than 1.9 million of their employees. Because we operate across the world's strictest financial regulation frameworks, we understand the nuances of local tax and regulatory implications on your international plans. With cutting-edge online services and 24/7 contact centres, we operate in every time zone, in 24 core languages and in all key currencies.



FULLY INTEGRATED END-TO-END SERVICES

From software only solutions to fully outsourced administration, we also offer financial reporting, our services flex to meet the unique needs of today's global equity and non-equity based compensation plans.

Equatex caters for the full range of international plan types and have over 20 years' experience in administering equity and non-equity compensation schemes across continents. Our cloud-based platforms are hosted on a secure Swiss banking network and delivers hassle-free access to powerful features for your administrators and employees alike, at any time and from anywhere.

With a comprehensive range of banking services, we support all major instruments, custody and funding solutions.

We provide execution and straight through trading on the leading world stock exchanges, as well as payment and FX services.

Through advanced compensation plan analytics, we enable you to not only track and report within your reporting cycles, but also unlock deep insights on the performance of your plans.

We have an established reputation for our IFRS accounting and financial reporting capabilities, as well as support for US GAAP and dual financial reporting.



ADMINISTRATION

Advanced platforms
EquatePlus and
EquateFalcon with full
services, customised for you



DATA ANALYTICS

Smart insights and custom
reports from multiple
data feeds

BANKING SERVICES

Plan instruments, trade and execution,
asset custody, payment processing

ACCOUNTING AND FINANCIAL REPORTING

Leading IFRS2 and US GAAP
compliant tool: **EquatePyramid**



FULL SERVICE SOLUTIONS



WORLDWIDE REACH

We enable our clients to easily deliver engaging plans to their employees across borders, languages, currencies and exchanges.

- Full coverage of all major markets
- Compliant with local regulations
- Accounting and financial reporting, IFRS and US GAAP
- Service in 24 languages
- Trade in all major currencies



TRUSTED AND SECURE

We deliver to the highest security, financial and quality standards expected of an internationally regulated partner.

- Hosted on a secure Swiss banking network
- Automate and administer with ease
- Analyse and report in real-time
- SSO, 2-factor verification
- Advanced security options



CUSTOMISE YOUR SERVICE

We customise our services effortlessly to meet the unique needs of our clients, from branding to technical or regulatory plan requirements.

- Customise to your brand
- Administration for your compensation plans
- Funding, hedging and custodian services (of plan instruments)
- Execution, FX, payments, global nominee service



ENGAGE PARTICIPANTS

We empower participants to manage their plans effortlessly through clear, intuitive and helpful services 24/7, online, by phone or via the mobile App.

- Online 24/7, on App or by phone
- Worldwide access
- Portfolio overview real-time
- Straight through trading
- Communication, tutorials and step-by-step guidance



GLOBAL CITIZENS

We are global citizens by nature. Equatex is a truly dynamic and multicultural environment with 4 favourably connected operations centres worldwide.

From our product specialists and account managers, to our developers, linguists, analysts and finance experts, our focus is centred on our mission to cut through the complexity of compensation plan administration for today's global enterprise.

While covering all the processes of a large enterprise, our team centric approach promotes a diverse and humanised company culture. Every employee is valued and supported to take ownership and responsibility from end to end. We are driven by new ideas and a common commitment to delivering a world-class service.

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- 1. ZURICH ● ● ●
 - 2. WARSAW* ●
 - 3. OSLO ● ●
 - 4. FRANKFURT ○
 - 5. CANTON ○

* Warsaw – operational 1 Jan 2018

KEY:

- Headquarters
- Technology Hub
- Equatex Companies
- Local Banking Partners

PRESENT ON 2 CONTINENTS

7 OPERATION CENTRES

WORLDWIDE



EVERY 5 SECONDS
A USER LOGS IN
FROM SOMEWHERE
IN THE WORLD



TECHNOLOGY AT THE HEART

Innovative technology is at the heart of everything we do, designed and built to simplify compensation plan management for the modern world.

POWERFUL AND FLEXIBLE

From comprehensive online plan administration to fully featured accounting and financial reporting, our systems cater for the complexities of international plan types, financial regulations and tax requirements. Flexible customisation ensures our platforms not only fit your company's plan requirements or reporting cycles, but also your languages, culture and brand.

ACCESSIBLE AND SECURE

Our web-based platforms are hosted on the Swiss banking network and protected by the high standards and resilience required by the global financial markets in which we operate. With extended security options, including Single Sign On (SSO) and Secure Key Authentication, we provide your users with hassle-free access and the peace of mind that comes with high security.

ENGAGING AND EMPOWERING

Because we operate a user-centred development approach, our platforms are designed with an empowering user experience from the start. Participants can manage their portfolio in real time and on the go from their mobile devices or execute straight-through trades online. Administrators can collaborate across borders, manage targeted plan communications and produce advanced reports with ease.





COMPENSATION PLAN MANAGEMENT FOR THE MODERN WORLD



WHERE CUTTING-EDGE TECHNOLOGY MEETS MARKET EXPERTISE AND SERVICE EXCELLENCE



EQUATEPLUS

POWERFUL, REAL TIME, INTUITIVE

The secure, easy to use web-based platform for your equity and non-equity based compensation plans.

The powerful capabilities, features and automation of EquatePlus ensure administering complex plans across borders is a breeze. It is available in 23 languages and directly linked with banking networks across the world. **EquatePlus** enables participants to manage their plans intuitively and execute in real-time. It is fully customisable to your business and packed with engaging plan communication options.

www.equatex.com/plus

EQUATEMOBILE

FOR THE MOBILE-FIRST GENERATION

Give your participants access to their plans anytime, anywhere, on their devices.

Today 8 out of 10 people access the web on multiple devices, increasingly mobile first. Your participants can now keep up to date with their portfolio straight from their smartphone and never miss plan-related events or opportunities again. Protected by state-of-the-art security, the full featured App is available for iOS and Android devices.

www.equatex.com/mobile

EQUATEFALCON

NEW AWARDS FASTER, SMARTER, SAFER

Cut the time and effort of delivering new awards.

Spreadsheets and error-prone manual calculations are simply no longer suitable practices for international corporations today. EquateFalcon enables you to deliver new awards without the headaches. It significantly cuts your workloads and removes complexity of new awards with all the certainty of a fully auditable process.

www.equatex.com/falcon



**20 YEARS
DELIVERING
EXCELLENCE**



EQUATEPYRAMID

**FLEXIBLE, ADVANCED, COMPLIANT
ACCOUNT AND FINANCIAL REPORTING**

EquatePyramid is the market leading enterprise solution for compensation plan financial reporting. The platform can be integrated into any leading plan administration system, such as EquatePlus, to deliver an extensive range of advanced accounting and disclosure reports.

Fully compliant with IFRS and support for US GAAP, EquatePyramid can receive feeds containing participant and transactional data directly from company records and third-party administrators to create reports in real-time.

www.equatex.com/pyramid

EQUATEINSIGHT

**MANAGEMENT INFORMATION
SYSTEM FOR COMPENSATION PLANS**

Our data analytics services provides comprehensive insights into your compensation plans, including people analytics, equity analytics and other custom analytics.

We provide dashboards, graphics and reports created from complex data and from multiple sources, including industry benchmarks. Insights are available real-time, for fast analysis and quick decision making, when you need it.

www.equatex.com/insight



**1.9 MILLION
PARTICIPANTS
WORLDWIDE**

EQUATEX OFFICES

SMART TAILORING

We believe that every company is unique.

That is why we customise our solutions to reflect your service requirements and your brand. Find out how this smarter approach can transform the management of your compensation plans.

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