

# Merriman Holdings, Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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## Abstracts

Merriman Holdings, Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Merriman Holdings, Inc. and its competitors. This provides our Clients with a clear understanding of Merriman Holdings, Inc. position in the Industry.

The report contains detailed information about Merriman Holdings, Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Merriman Holdings, Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Merriman Holdings, Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-

term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Merriman Holdings, Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Merriman Holdings, Inc. business.

### **About Merriman Holdings, Inc.**

Merriman Holdings, Inc., through its primary operating subsidiary, Merriman & Co., provides equity research, capital markets services, corporate and venture services, and investment banking services primarily in the United States and Canada. The company provides equity research, brokerage and trading services primarily to institutions, as well as investment banking and advisory services to corporate clients.

#### Principal Services

The company's investment bank / broker-dealer segment provides three service offerings: investment banking, brokerage, and equity research. It also provides traditional research-based financial services to companies in the underserved sector of the financial services industry.

#### Investment Banking

The company's investment bankers provide a range of corporate finance and strategic advisory services.

**Corporate Finance:** The company's corporate finance practice advises on and

structures capital raising solutions for its corporate clients through public and private offerings of primarily equity and convertible debt securities. It offers a range of financial services designed to meet the needs of fast-growing companies, including initial public offerings, secondary offerings, private investments in public equity (PIPEs), and private placements. The company's equity capital markets team executes underwritten securities offerings, assists clients with investor relations advice and introduces companies seeking to raise capital to investors.

**Strategic Advisory:** The company's strategic advisory services include transaction-specific advice regarding mergers and acquisitions, divestitures, spin-offs, and privatizations, as well as general strategic advice. Its strategic advisory services are also supported by its capital markets professionals, who provide assistance in acquisition financing in connection with mergers and acquisitions transactions.

#### Institutional Brokerage Services

The company provides institutional sales, sales trading, and trading services to approximately 324 institutional accounts in the United States. It executes securities transactions for money managers, mutual funds, hedge funds, insurance companies, and pension and profit-sharing plans. The company provides integrated research and trading solutions centered on helping its institutional clients to invest profitably, to grow their portfolios and ultimately their businesses.

**Institutional Sales:** The company's sales professionals focus on communicating investment ideas to its clients and executing trades in securities of companies in its target growth sectors. By actively trading in these securities, the company attempts to couple the capital market information flow with the fundamental information flow provided by its analysts.

**Sales Trading:** The company's sales traders are experienced in the industry and possess knowledge of both the markets for fast-growing company securities and the institutional traders who buy and sell them.

**Trading:** The company's trading professionals facilitate liquidity discovery in equity securities. It makes markets in securities traded on NASDAQ, stock exchanges and electronic communications networks (ECNs), and services the trading desks of institutions in the United States. The company's trading professionals have direct access to the major stock exchanges, including the New York Stock Exchange and the American Stock Exchange. As of December 31, 2009, the company was a market

maker in 163 securities. The customer base of its institutional brokerage business includes mutual funds, hedge funds, and private investment firms.

**Proprietary Trading:** The company would take significant positions in fast-growing companies that it feels are undervalued in the marketplace.

**Corporate & Executive Services:** The company offers brokerage services to corporations for purposes, such as stock repurchase programs. It also serves the needs of company executives with restricted stock transactions, cashless exercise of options, and liquidity strategies.

**Venture Services:** The Venture Services team provides sales distribution for capital raises for private companies via the introduction to venture

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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## ANALYSIS FEATURES

### SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

### Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

### PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

### Key Factors Examined by PESTEL Analysis:

**Political** – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

**Economic** – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

**Sociological** – What cultural and societal aspects will work upon the demand for the business's products and operations?

**Technological** – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

**Environmental** – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

**Legal** – What laws and legislation will exert influence on the style the business is carried out?

### **IFE, EFE, IE Matrices**

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

### **Porter Five Forces Analysis**

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

### **VRIO Analysis**

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

## Reputation

### Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

## I would like to order

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