



**EARLYBIRD**

**Safe, Smart Twitter for Finance**

# Custom SmartTrack Instructions

Rich, Natural Language Processing searches for Financially-  
Relevant Tweets

October 2019

**MarketEarlyBird.com**

# EarlyBird Custom SmartTracks

## What are SmartTracks?

SmartTracks are EarlyBird's rich, Natural Language Processing (NLP) Twitter searches. These go far beyond Twitter's public search tools to enable you to zero in on financially and politically relevant Tweets from the most influential Twitter accounts.

You can now build custom SmartTracks for your team or company, using the same rich programming system that EarlyBird uses to build system-wide SmartTracks for equities, financial and political events.

You can configure exactly what Tweets you want to receive in your or your team's EarlyBird Tweet feeds when they follow your custom SmartTracks, based on the content of those Tweets, the Twitter accounts that send them, and EarlyBird's unique analysis of financial language, relevance, influence and reputation.

## Create your first SmartTrack

- On the EarlyBird App, click the SmartTracks lightning-strike button to open the SmartTracks Selector page
- Click "Build SmartTracks" to open the editor in a separate browser page.
- Click ADD NEW to create a new SmartTrack
- Fill in the boxes:
  - **NAME:** Name of the smarttrack
  - **DESCRIPTION:** Optional
  - **CATEGORY:** Use this to group SmartTracks together in the app
  - **VISIBILITY:** Choose whether the SmartTrack is visible to just Team or the whole Company
  - **EDIT RESTRICTION:** Choose who can edit the SmartTrack

Note:

- You can change the edit and visibility restrictions later.
- The SmartTrack will not appear in the EarlyBird App until it is "Published". We recommend you don't click Publish until you have tested the SmartTrack thoroughly.

## Create a SmartTrack Rule

Click "**Build Rules**" to create your first rule for matching Tweets.

Detailed instructions for building rules are below, but simple rules are self-explanatory. For example you can simply type a company

name in the Inclusions box, to bring in all Tweets from anyone who mentions that company name.

## Test your rule

Click **Get Tweets** to run the search over recent days.

## Refine your rule

Typically if you're searching for any well-known brand (apple, google, Walmart etc) or political event (Brexit, election etc) your results will be swamped with "man in the street" tweets.

Depending on the type of search, use some or all of the techniques discussed later to refine the results so you see the higher quality tweets that would be hidden amongst this noise. For example instead of following just a company name, add "PLC" to exclude people simply talking about the brand.

## Preview the Tweet Quality Filter

Test the effect of EarlyBird's Quality Threshold setting at the top right – you can choose from one to five stars to set the minimum quality for financial relevance. Choosing a higher threshold will restrict the feed to "financially intelligent" Tweets from users with a focus and reputation on finance and politics.

This setting is not saved with the SmartTrack, but enables you to preview the results that end users will achieve with a given threshold.

## Build a second rule if needed

In most cases you'll have just one rule for matching Tweets, but you can have two or three if needed. The reasons for having multiple rules are covered later.

## Publish your SmartTrack

When you are happy with the results, click PUBLISH to make the SmartTrack available in the App.

The SmartTrack will be instantly visible either to all your team members or the whole company, according to which option you selected in the Visibility filter.

Please note that it can take a few minutes for the EarlyBird system to retrieve up to a few thousand Tweets that match the filter settings, and make these available to view in the SmartTrack app.

## Follow the SmartTrack in your EarlyBird App

Back in the main application, you'll find your SmartTrack under the category you chose. Click the SmartTrack for a quick review, then click Follow to add it to your Tweet feed and receive matching Tweets in real time. You can adjust the Tweet Quality Filter to maintain a high quality of Tweets with minimal noise.

# Advanced Search Topics

## Text Term Language

Within the Include and Exclude boxes, you can use simple words, or the rich text-search language below.

Term	Matches
Apple	Any tweets containing the word "apple". Note that it is a word-search not a text search, so will not match "apples". However note that "apples" will match "apple's". All searches are case insensitive. Word boundaries are space, end of line, punctuation, or case changes within words or hashtags eg #AppleIsRotten Note also that words may be contained within URLs within links contained in the Tweet.
Aston Martin	Any tweets containing those words including "Martin lives in Aston". You can think of a space between words as meaning "AND".
"Aston Martin PLC"	Only tweets containing the exact phrase "Aston Martin PLC", but will not match "Aston Martin Lagonda Global Holdings plc"
"Aston Martin PLC"~3	This is a "proximity match". It will match both "Aston Martin Plc" and up to three additional words within that phrase – so will also match "Aston Martin Lagonda Global Holdings plc". This is very useful for matching common variations of company names eg "Acme plc"~1 will also match "Acme Group plc". Max proximity is 6.
(happy or merry) and Christmas	Brackets can be used to create complex terms. This will match "happy Christmas" or "merry Christmas", or "I hope you are happy about the rotten Christmas you gave the kids"
(oil or gas or crude) AND (refinery or plant or facility or terminal or tanker) AND (explosion or killed or bomb or terrorist or terrorists or alert or deaths or dead or fire or smoke or casualties)	This is a single rule with multiple AND & OR clauses to match a variety of terms related to oil refinery emergencies.  For example this will match: "just in, smoke seen billowing from Wombacca Oil refinery".  This particular rule could be constructed as a single include-term as shown, or three separate include-terms using the "INCLUDING ALL" option under the Inclusions box

## A detailed look at SmartTrack Rules

Each SmartTrack can have any number of rules – but typically you will only need one or at most two or three rules for each search.

A single rule can specify:

- Text terms to include
- Text terms to exclude
- Only accept Tweets from specified Twitter accounts
- Reject Tweets from specified account
- Only verified users (Twitter verification typically indicates well known accounts eg politicians or media organisations)
- Reject retweets (recommended for high volume searches)
- Reject replies (recommended for “official” company Twitter accounts which also handle customer service enquiries)
- Over X followers (Recommended for high volume searches, higher follow count typically means more influential Twitter accounts)
- Text terms can be as simple as a single word, or complex combinations using brackets, quotes, proximity, AND, OR etc as detailed above.

## Text Rules vs Twitter User Rules

There are two main types of rule, text-matching rules and Twitter-account matching rules.

### Text searches

The most common type of rule uses text-matching from any account.

For example enter a term like **BREXIT** in the Inclusions box and hit return. This will match any Tweets containing that term – which will be A LOT OF TWEETS. You can use the techniques described later and the rich search language to refine the results to a manageable volume.

Note that the end user can further refine the search use EarlyBird’s Intelligent Tweet filtering to get their choice of volume vs quantity.

### Twitter-Account searches

This type of search restricts the search to specific accounts. You can get ALL tweets from the specified account by leaving the text fields blank, or combine with a text-search.

Type the name of a specific account in the “Twitter authors to include” box, eg typing “Boris” will bring up accounts of that name

roughly starting with the well-known ones, so Boris Johnson is high up in the list.

You can add a number of users here so you end up for example with all the members of the cabinet, or all executive officers of a specific company.

This type of search is useful if for example you're following Apple – you'd want all Tweets by Tim Cook whether or not they mention "Apple". Similarly if you were following "Brexit" you want all Tweets by Michel Barnier though they would rarely actually mention Brexit.

### Combined Text and User searches

You can combine these two types of rules, for example to only have Tweets containing "OPEC" from a select set of analysts or news outlets.

## Why Use Multiple Rules?

When you have more than one rule in a SmartTrack you build and preview them separately so you can adjust the results in each. However in the end-user application the results are combined into a single SmartTrack.

In most cases you will find one rule will be sufficient, but there are a couple of reasons you might need two or three:

### One rule for terms, another for specific accounts

Using Apple as the ubiquitous example, you might have a rule to bring in \$AAPL or "Apple Inc". But you may want a separate rule to bring in ALL tweets from specific accounts eg Tim Cook. He is unlikely to mention the name of his company in his Tweets though they may be highly significant, so you want all his Tweets even if some are irrelevant.

### Different Restrictions for different keywords

You might want to follow both "Apple Inc" and "AAPL". You could do this in one rule, however if you wanted to apply different restrictions (eg verified only) you'd need two rules.

## Refining Rules to improve Quality

- Use the restrictions to include Tweets only from Verified users (these are bona-fide politicians, news outlets, celebrities etc, this technique is good for political events).
- Turn off Retweets and replies
- Include only English language (very useful where the company name is (say) a Spanish verb)
- Set a minimum follow-count on the Twitter accounts (useful for brand-name searches like Apple)
- Remove persistent false-positive Twitter accounts (for example when following CARRS company, remove the "CARRS COMMUNITY

CENTRE” Twitter account by clicking on the red X. The Twitter account will be added to the exclusions. Don’t attempt to remove one-off Tweets in this way, but it is very useful when an account is repeatedly Tweeting

- Add inclusions to focus on the company not the brand, eg following Tesco PLC or Apple Inc will render much better results than Tesco or Apple.
- For Brand names like Tesco, follow the ticker TSCO instead. This will match both \$TSCO and #TSCO.
- Add exclusion keywords to remove false positives – eg if following TSCO for the UK Tesco supermarket, exclude “Tractor” to remove Tweets related to Tractor Supply Company which shares that ticker.

## Behind the Scenes

EarlyBird provides you with a rich system for selecting the Tweets you need, but this is only part of the story.

In addition to the filters you set up, EarlyBird is automatically providing a further level of filtering to ensure you only receive appropriate and relevant Tweets.

This includes:

- Compliance Threshold Filters – your compliance team may block certain categories of sender (e.g. brand new accounts or those with a very small number of followers)
- EarlyBird applies its own filtering to remove certain accounts which repeatedly Tweet fake news
- Pornography is removed with a high degree of accuracy
- EarlyBird continuously monitors and adjusts its analysis of financial reputation and influence based on proprietary analysis of Tweet content and Twitter-wide engagement signals – the result is rapid and continual improvement of SmartTracks over time.
- If the volume of Tweets matched by the SmartTrack suddenly becomes very large, EarlyBird will automatically raise the quality threshold to remove lower-quality Tweets, to ensure your feed does not become swamped with Tweets

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THE EARLYBIRD CATCHES THE #WORD