PeerLogix

What's streaming. *Who's watching.*
peerlogix.com

Streaming demand, observed at the household level. Weeks ahead of the earnings tape.

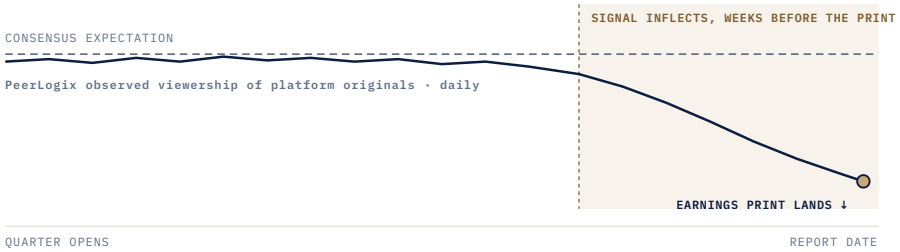
PeerLogix sits directly in the OTT stream and observes what actual households watch across virtually every major platform. The result is a daily, title-level read on streaming demand: which platforms are gaining or bleeding engagement, and where the quarter is trending, while the quarter is still open.

ONE PANEL ·
EVERY PLATFORM

NETFLIX HBO MAX Disney+ prime video hulu Paramount+ peacock Apple TV+
crunchyroll + more

The signal moves before the print.

FIG. 01 · ILLUSTRATIVE



Subscribers are reported once a quarter. Viewership of the platform's originals is observable every day in between. The shaded window is the desk's edge.

70M+	200K+	10+ yrs	Daily
HOUSEHOLDS OBSERVED	TITLES · EPISODE-LEVEL	CONTIGUOUS HISTORY	TITLE-LEVEL FEED · CSV / API

§ 01 MEASURED, NOT SURVEYED

Legacy panels extrapolate from ~900 households; walled gardens self-report on their own schedule. PeerLogix's patented platform (two granted U.S. patents) observes viewership through authorized media applications (no PII) across *every* major platform in one panel. Engagement flowing from one streamer's originals to a rival's is visible in the same feed.

§ 02 WHAT THE DESK GETS

Intra-quarter demand read: daily viewership of each platform's originals, a same-day proxy for subscriber momentum.

Cross-platform competition: rival catalogs measured in one panel, long and short side of the trade.

Regional granularity: 174 countries, 210 US DMAs, mapping to reported segments.

CURRENT DATA SOURCES

Current viewing signals come from an opted-in panel using authorized media-center and media-player applications, plus TV and movie tracking apps. They include streaming consumption, reported viewing, and watchlist interest.
Source methodology · Partnerships and sourcing history

The signal, validated.

§ 03 HISTORICAL VALIDATION · A MAJOR SVOD PLATFORM

In a multi-year backtest, PeerLogix forecast a leading streaming platform's quarterly revenues and ending subscribers using only observed viewership of its originals, filtered to persistent households. Regressions trained exclusively on data available before each print produced out-of-sample forecasts that closely tracked reported results in every region:

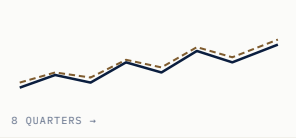
Forecasting Platform A's quarter: three signals, tested.

FIG. 02 · BACKTEST

Dashed gold, identical in every panel: Platform A's reported quarterly results, known only after the print. **Solid:** a signal you could watch *during* the quarter. Which one anticipates the gold line?

SIGNAL 01 · PEERLOGIX PANEL

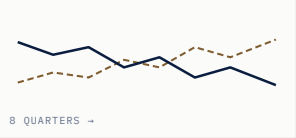
PeerLogix households streaming A's originals



+.90 Up → A's quarter up

SIGNAL 02 · SAME PANEL

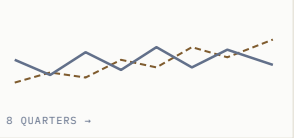
Same households defecting to a competitor's originals



−.87 Up → A's quarter down

SIGNAL 03 · PUBLIC DOMAIN

Google-search interest in "Platform A"



+.21 No signal either way

Read: both PeerLogix signals lead: viewing of A's originals tracks the quarter as it forms, and defections to a rival flag trouble before it prints. Public search data sees neither. Curves stylized; correlations from backtest.

§ 04 IN PRACTICE

Media-sector long/short fund

Uses the daily title-trend file to flag week-over-week engagement cliffs on the streaming platforms it trades; the signal has moved ahead of subscriber prints on multiple occasions.

Beyond the tickers

The same feed prices content M&A and catalog value: PeerLogix signal informed Pluto.tv's licensing strategy ahead of its $340M acquisition by Viacom.

> *"It reads like a Bloomberg for what people are actually watching."*
>
> , PM, MEDIA-SECTOR HEDGE FUND

§ 05 DELIVERY & COMPLIANCE

Format. Daily title-level signal files (CSV or API) plus custom analyses for analysts.

History. 10+ years of contiguous, point-in-time household viewership for backtesting.

Privacy. Household-level, no PII. CCPA + GDPR compliant, clean for compliance review.

Point us at the tickers you trade.

Sample data available: a trial pull against the names on your coverage list, 48-hour turnaround.

Request sample data → Book a call

peerlogix.com

William Gorfein, Founder

HISTORICAL RESULTS ARE ILLUSTRATIVE, NOT INVESTMENT ADVICE