

# PeerLogix

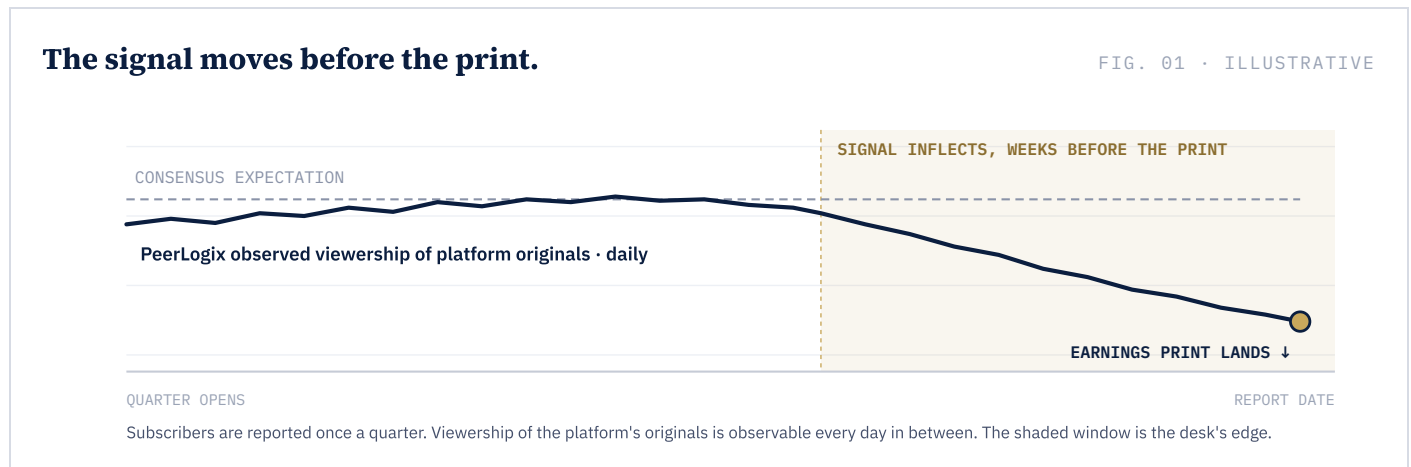
## Streaming demand, observed at the household level. Weeks ahead of the earnings tape.

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



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

### § 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 at the source (no surveys, 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

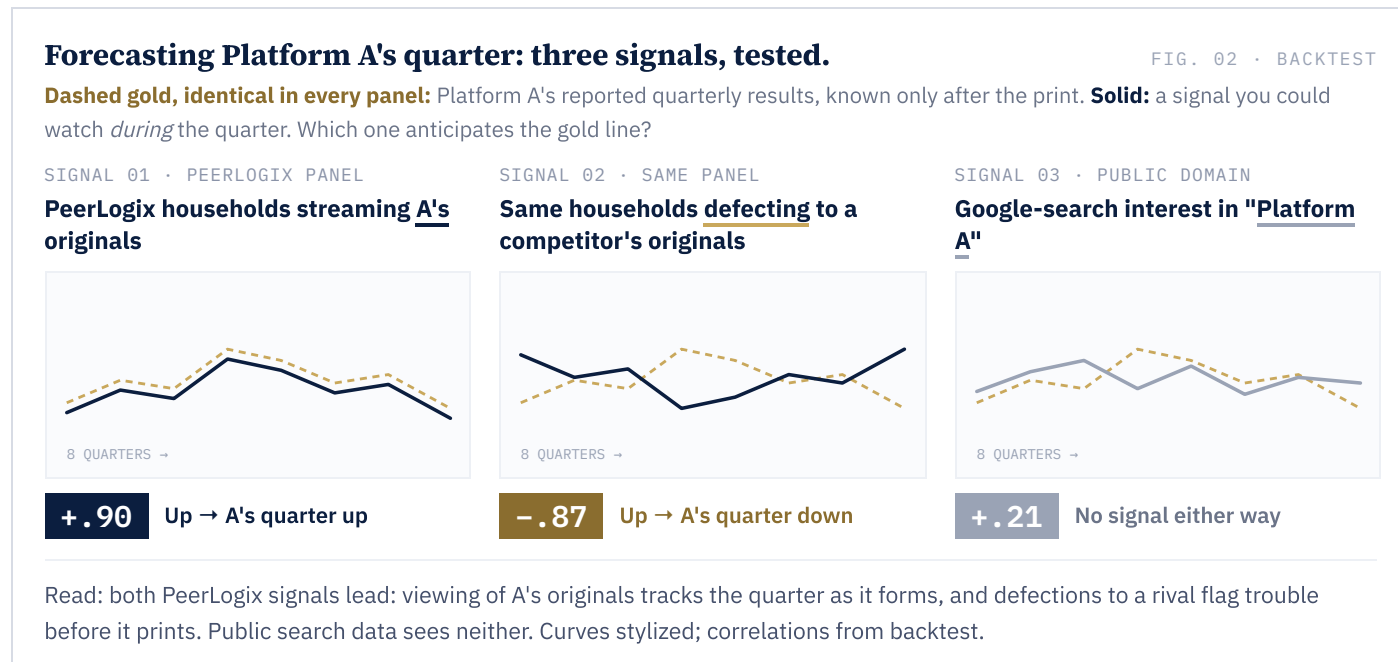
**Intra-quarter demand read:** daily viewership of each platform's originals, a same-day proxy for subscriber momentum.

**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.

## § 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:



## § 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.

peerlogix.com  
William Gorfein, Founder