

**Request For Proposal For Public Relations Services**  
**OANDA Corporation**  
**June 9, 2014**

**Overview**

This is a request for a public relations proposal for OANDA Corporation.

The proposal should incorporate the development of a global public relations plan and the following activities: media relations, digital strategy and content development, product announcements/launches, market commentary/analysis placements ([MarketPulse](#) team), thought leadership (FX/CFD, technology & finance), relationship building with appropriate third parties/influencers, and events (in-office + external) and/or sponsorship that support overall Marketing messages.

The proposal should be based on a yearly budget of approximately US\$500,000.00 globally for fees and expenses. The deadline for your intent to submit a proposal is 5:00pm ET on Wed., June 11<sup>th</sup>, 2014. The deadline for submissions is 5:00pm ET on Friday, June 27<sup>th</sup>, 2014. The short list will be invited to Toronto/San Francisco to present to the OANDA team in early-mid July 2014, TBD. Proposals should be sent via both email ([bcouto@oanda.com](mailto:bcouto@oanda.com)) and in hard copy to:

Bernice Couto  
OANDA Corporation  
370 King Street West, 3<sup>rd</sup> Floor  
Toronto, ON  
M5V 2H8

We are soliciting proposals from approximately 15 agencies. Upon review of submissions, we will interview 2-4 firms.

All proposals should include:

- PR, Digital, Events, Sponsorship & Awards recommendations for 2015
- Detailed budget and timeline
- Daily media monitoring (including competitive analysis)
- Monthly, quarterly and annual coverage & competitive reports
- Detailed goals and measurement (ROI)
- List of proposed team members, including biographies, billing rates and level of participation in the account
- Brief case studies that illustrate ability and experience in forex and/or financial services
- List of current and former clients, highlighting any in forex or a related industry
- Existing relationships, or in-house, creative and media buying teams
- Explanation of PR firm's billing procedures including rates, mark-ups, etc.

- References

All proposals will be evaluated on:

- Demonstrated expertise in and understanding of forex
- Understanding of and ability to meet our goals and objectives
- Firm and personnel qualifications and experience with weight given to experience of account team
- Ability of proposal to be executed within budget
- Creativity

**OANDA Business/PR priorities:**

- Build awareness of our product or service to help increase market share
- Position OANDA as *the* (smarter) choice for traders
- Position OANDA and its senior management as experts in the field
- Help OANDA bring credibility to the industry
- Raise brand awareness through philanthropic activities and sponsorships
- Customer retention
- Attract, retain and motivate employees

**About Us:**

OANDA Corporation transformed the business of foreign exchange through an innovative approach to forex and CFD trading. The company's industry leading online trading platform, fxTrade, introduced a number of firsts to the marketplace, including immediate execution in 2001; instant settlement on trades; and trades of any size between one unit and 10 million units. The company's [many awards](#) attest to the power and flexibility of its trading platform. In 2013, OANDA was honored with more than a dozen awards, including 'Best Trade Execution Provider', 'Best Retail Trading Platform' and 'Best Mobile Trading Platform' by International Finance Magazine; as well as 'Best Value for Money' by Investment Trends in each the U.S., UK, and Asia Pacific markets.

OANDA was the first online provider of comprehensive currency exchange information, and today the company's OANDA Exchange Rates for Business provides benchmark rates for corporations, auditing firms, and global banks.

OANDA has eight offices worldwide in Chicago, New York, Boston, London, Singapore, Sydney, Tokyo, and Toronto. OANDA is fully regulated by the U.S. Commodity Futures Trading Commission (CFTC), the U.S. National Futures Association (NFA), the Monetary Authority of Singapore (MAS), the Australian Securities and Investments Commission (ASIC), the Investment Industry Regulatory Organization of Canada (IIROC), the UK Financial Conduct Authority (FCA), and the Japanese Financial Services Agency (FSA).

OANDA was co-founded by Dr. Michael Stumm, a professor of Computer Engineering at the University of Toronto, and Dr. Richard Olsen of The Olsen Ltd., a leading

econometric research and development firm. The company was incorporated in the state of Delaware in 1996.

### **OANDA Products & Services**

[www.oanda.com](http://www.oanda.com) - Currency information, tools, and resources for investors, businesses, and travelers.

[www.fxTrade.oanda.com](http://www.fxTrade.oanda.com) - A fair, transparent, low-cost and flexible forex and Contract For Difference (CFD) trading platform for traders, investment managers, financial institutions, and corporations.

[fxTrade Demo](#) – Free, real-time, real-data account to learn forex and CFD trading and develop/test risk management strategies.

[fxTrade Mobile](#) – Our mobile trading offering, available for the iPhone, Android phones, iPads and tables.

[OANDA Trade Leaders Program](#) – copy/mirror trading (via recent acquisition of Currensee)

[OANDA API](#)

[FX Analysis & Tools](#) – Free tools and data to help develop trading strategies.

OANDA Labs (Research and Innovation) - Read our [Forex Lab Notes blog](#) about innovation, product design, and next-generation trading technology.

[OANDA Exchange Rates](#) (for Business) – provides global currency rate information for corporate planning, and finance and e-commerce systems.

[MarketPulse](#) - RSS feeds and daily market reports from our resident currency analysts around the globe.

### **OANDA Key Messages:**

- OANDA is a company focused on creating a fairer marketplace. From day one – since 2001 - we've been upending the forex industry by using disruptive technology to create a fairer market.
- Through our technology, we're giving our customers better pricing, better execution, and better trading confidence.
- The spreads our customers trade on are often lower than those we receive from many of the world's largest banks
- We are close to offering single digit millisecond latency – which means we increase our customers' returns by up to 25% over competition
- The dirty secret in the FX industry is that many counterparties reject your trades if they can't make an immediate profit for themselves. Major banks

reject up to 30% of the trades they receive. At OANDA, we reject ZERO trades.

- We are the trader's advocate. We're helping our clients become better traders, with every trade, one trade at a time.
- Independent NFA quarterly reports: our clients are consistently more successful than those at most other brokers
- One of the most important things we can do is provide education and tools for people who are investing in and trading in currencies. Whether you're a new trader or a more experienced trader, we offer the tools that can help improve how people trade (ongoing, free webinars).
- MarketPulse offers fresh, daily analysis from our currency strategists. (We have a world-class team; our head strategist is often called on by the Bank of Canada for consultation.)
- fxTrade Practice is unlimited and free to use;
- We have no commissions, no hidden fees.
- We have had zero findings, fines or actions over 12 years across five different regulators.
- In December 2013 as many as 51% of our customer logins came from our mobile trading platform

**OANDA customers:**

- Primary: FX and CFD traders
- Secondary: Investors looking for alternative asset classes

**Primary Competitors (differ by geography):**

- FXCM
- Gain Capital
- CMC Markets
- Alpari
- Saxo Bank
- IG Markets
- JYFX
- DMM
- GMO Click

**Questions?**

Please email Bernice at [bcouto@oanda.com](mailto:bcouto@oanda.com) if you need additional information or have any questions.