

II INSIGHTS DASHBOARD Sell-Side Research FAQs



The Dashboard is designed to explore and analyse survey data, providing actionable insights for company strategy and competitive positioning



How do I view the list of firms that vote in the survey?

• Use the Survey Participants dashboard.

• Select the specific Survey you're interested in from the filter bar at the top of the sheet.

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How do I view the firms who are grouped in a specific region?

Within the Participants dashboard, there is a chart that shows the number of participants by Region.

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- The Selector above the chart can be used to show different breakdowns.
 - The Country of voter company HQ.
 - The voter location (Country).
- Like most Qlik charts, this chart is interactive.
- By clicking on a location, then the Green tick to confirm, the rest of the dashboard will then re-paint based on that selection.





How do I download the data that I see?

- Right click within the main table of buy side firm names and you will see the option to Download As
 Select Download As > Data to download as a spreadsheet.
- This will download a filtered list of clients, including details of how many Sectors they voted in.
- There is also a second sheet in the dashboard, Buy Side Participants Sector Names. Rather than specifying how many sectors the firm voted in, this sheet will list all of the sectors. This sheet allows you to download a single spreadsheet for a complete survey, listing all of the firms voting sector by sector.

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Can I change the region pie/bar chart view so I can see the actual data i.e. for regions that are very small in the pie chart?

- Yes, there is usually a Selector above all of the region charts to select different breakdowns.
- This may be a separate drop-down...



• ...Or it may be a similar but integrated drop-down field within the chart itself.



