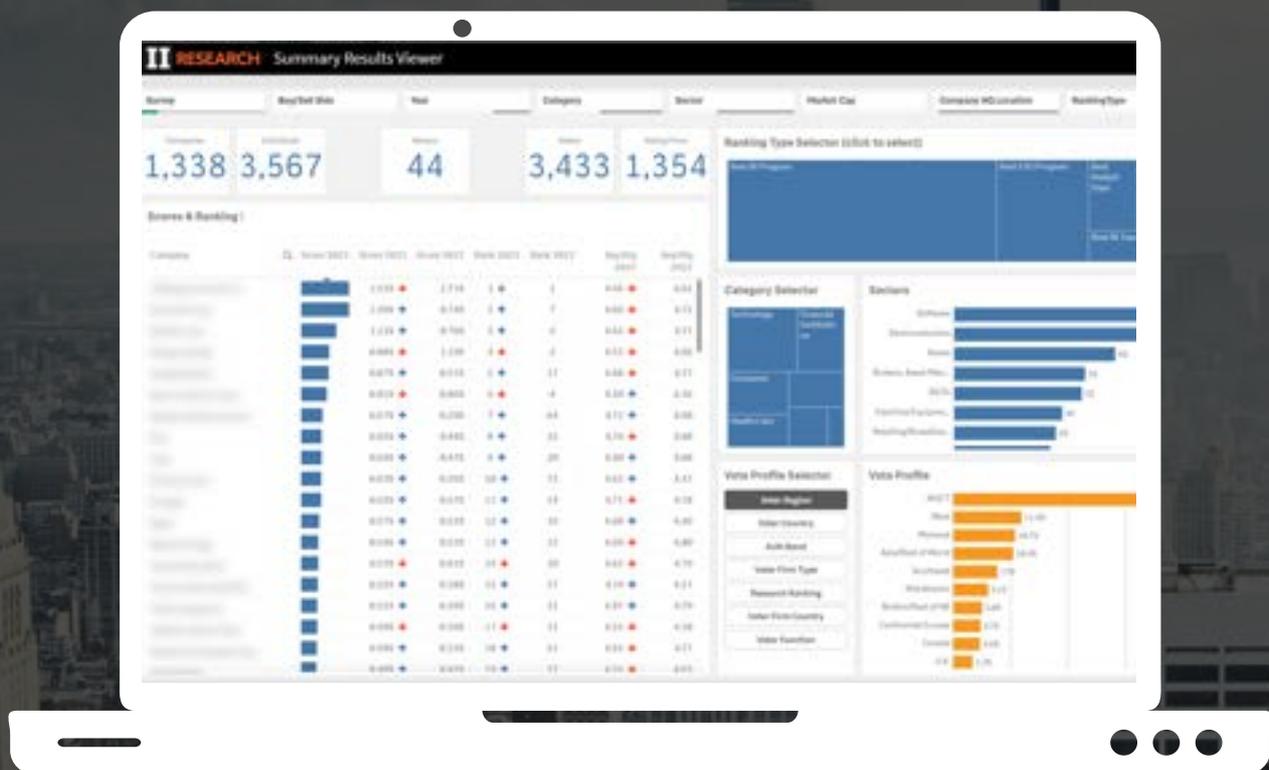


# II INSIGHTS DASHBOARD QUICK START USER GUIDE

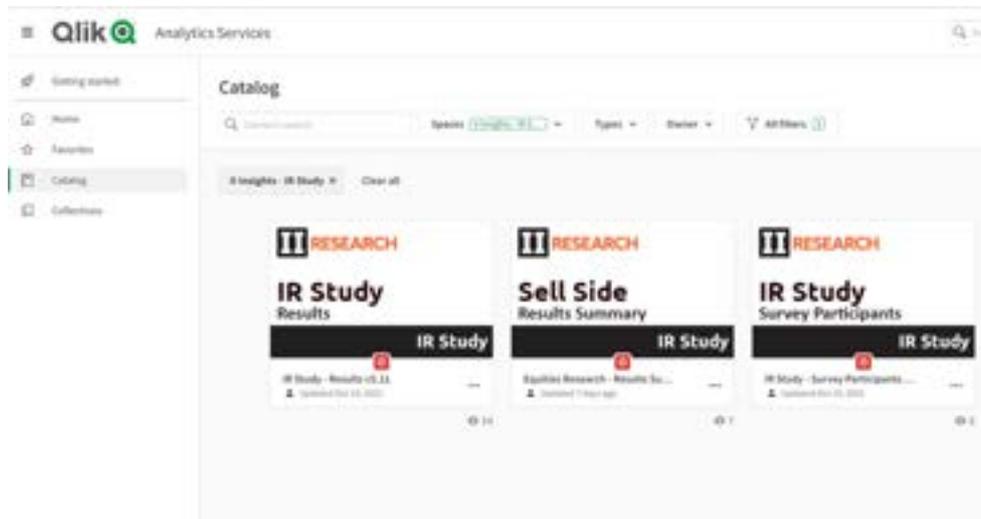
**Corporate Executive & IR teams**



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

## Opening the Dashboard

- Multiple dashboards available from your home page.
- These include:
  - IR Study Results– Your full perception analysis
  - A detailed list of Buy & Sell Side Participants who voted in the survey
  - A summary of the Sell-Side Equity Research survey results
  - IR Best Practice results
- Opening the dashboard.

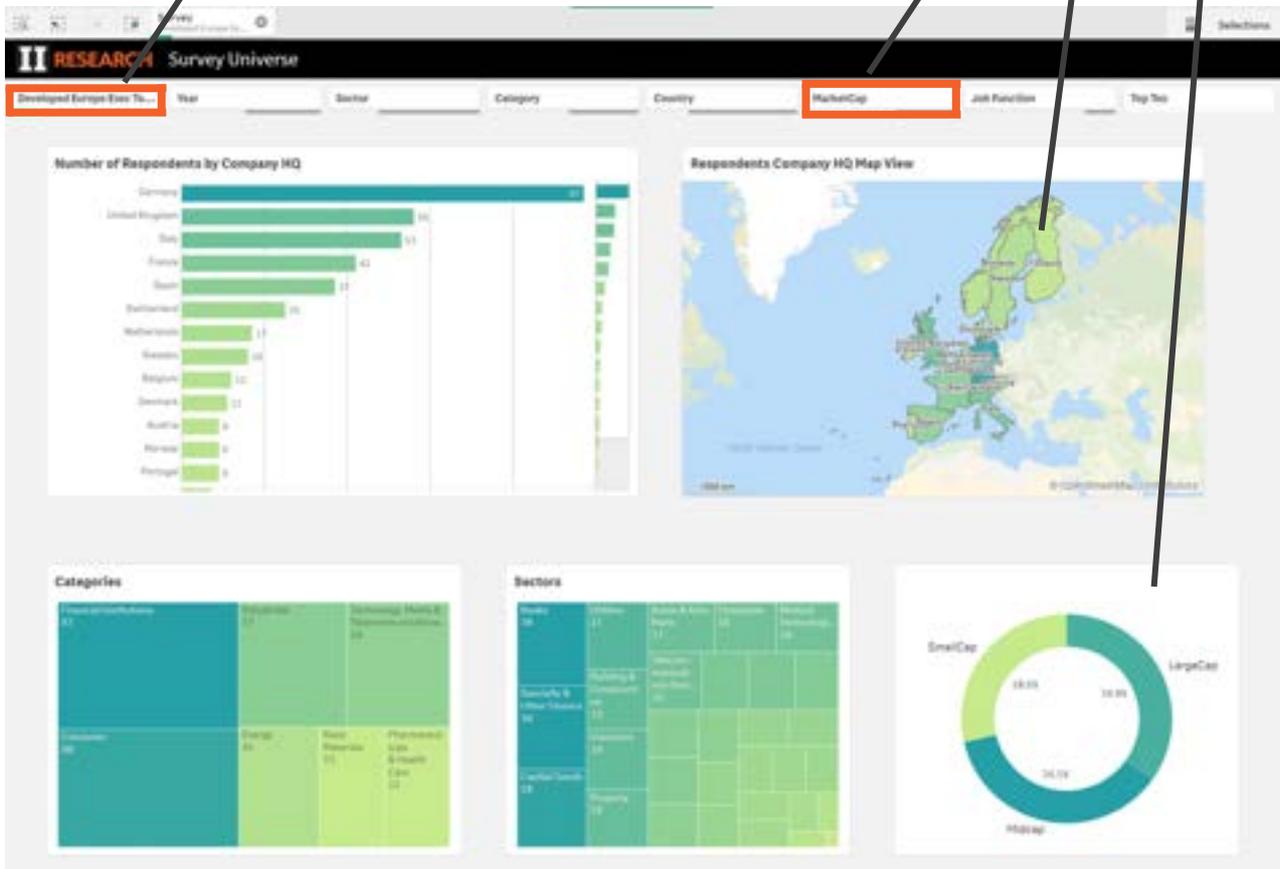


# IR Best Practice Dashboard: Survey Universe

- Drill deeper by using various filter dimensions.
- Layer dimensions (e.g. Region and Market Cap).
- You can apply these filters either by using the selection boxes at the top of the screen or by clicking directly into the charts.
- If you have access to Multiple Surveys, Select one using the Survey Selector Filter.

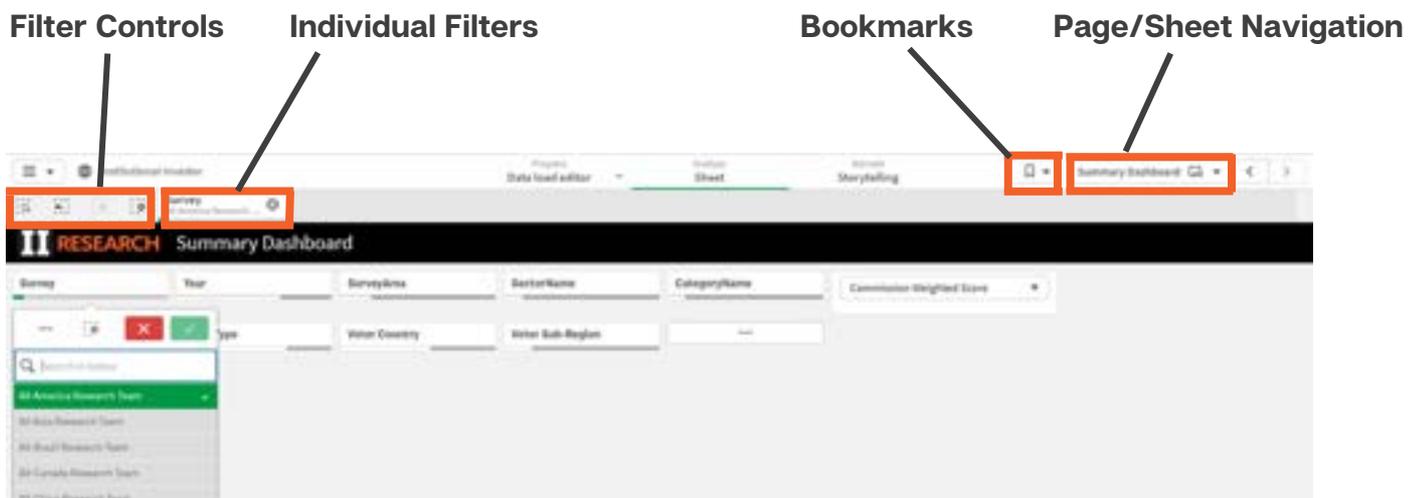
Survey Sector

Filter by drop downs or interactive charts



## Notes on Filters and Controls

- Basic navigation, filters work the same in all dashboards.
- Filter selections:
  - Green – selected item(s)
  - White – available options
  - Grey – not available based on other selection
- Filter controls (back/fwd/clear all) plus modifying, clearing individual selections are at Top Left.
- Page/Sheet navigation controls are at Top right.
- Once filters are in place in one tab they carry over and apply in other tabs.

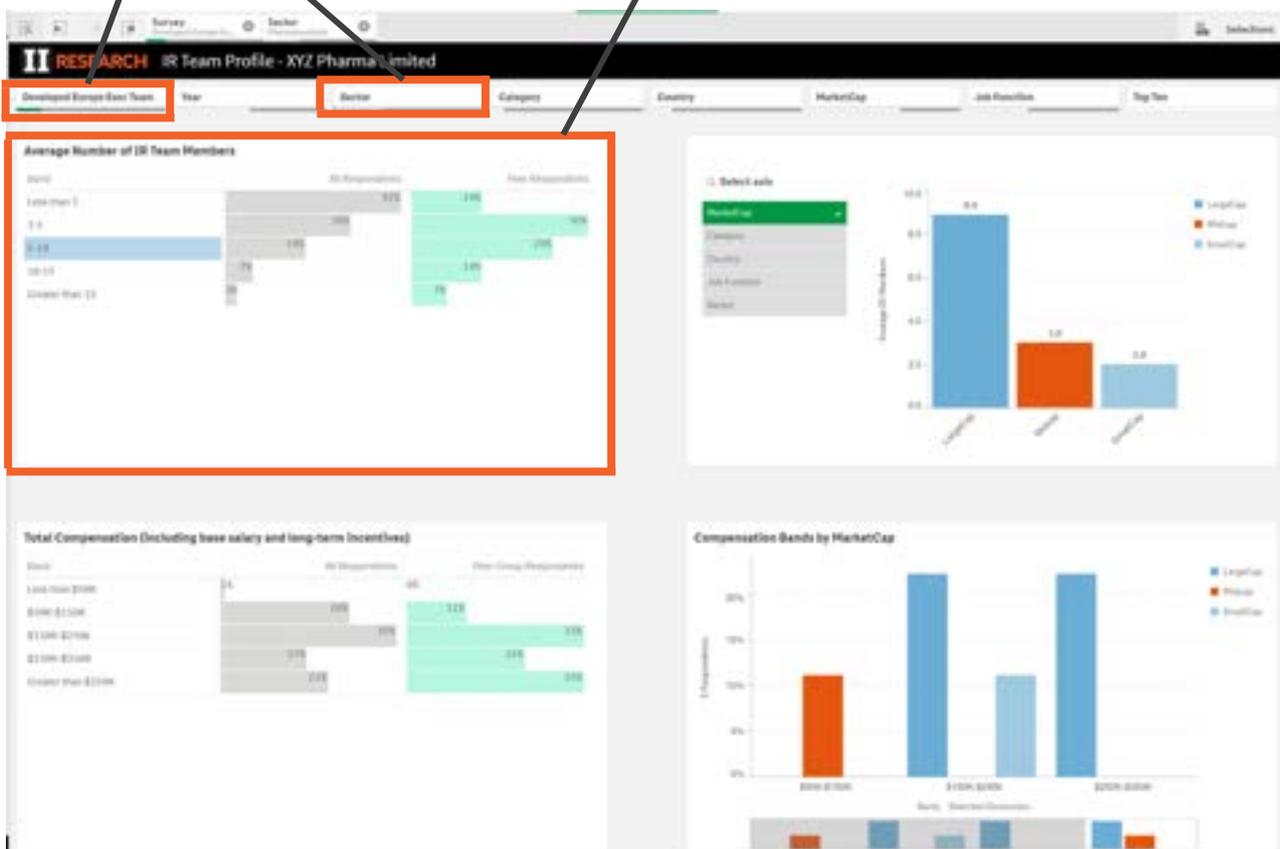


# IR Best Practice Response Dashboards

- Many of the Best Practice dashboards work identically.
- Charts on the left are showing the average responses across:
  - All survey respondents (grey)
  - A selected Peer group (green)
  - Your firm response (blue)
- The Peer group can be selected using the top row filter bar eg Your Sector Peers (Pharmaceuticals Sector), Midcap firms or pre-defined Survey Peer groups (Top Ten Companies, etc.)
- Charts on the right show response breakdowns by other chosen criteria (e.g. by Market Cap, Country etc).

Filter allows the selection of specific respondent peer groups

Blue: your firm's response  
 Grey: aggregated result from All respondents  
 Green: results from the chosen peer group



## IR Best Practice – Buy/Sell-Side Ranking Tables

- Ranking dashboards show top-ranked:
  - Buy-Side teams
  - Sell Side Research
  - Sell Side Corporate Access
- Results can be filtered using the top row filter bar to select Corporate voters by Sector, Geography, Market Cap etc., e.g. Chemicals Sector voting firms, Swiss Large Cap firms or pre-defined Survey Peer groups (Top Ten Companies etc).
- The large figures above the table show both the voter universe and the nominated buy/sell-side firms.

Select Sector or other voter group filters

Updated Top Ranked Buy/Sell side firms based on the filtered criteria

You firm's responses/ranks displayed in the Rank column

The screenshot displays the 'Buy Side IR Ranking' dashboard. At the top, there is a filter bar with a dropdown menu set to 'Sector'. Below the filter bar, three summary statistics are shown: 'Total survey voters' (405), 'No of voters who ranked Buy Side' (294), and 'Voted for Buy Side firms' (338). The main part of the dashboard is a table titled 'Buy Side Rankings - Selections'. The table has several columns, including 'Company', 'Rank', 'Market Cap', and 'Voting Score'. Three orange boxes are overlaid on the image: one on the filter bar, one on the table content, and one on a specific rank column.

Company	Rank	Market Cap	Voting Score
...	1	...	...
...	2	...	...
...	3	...	...
...	4	...	...
...	5	...	...
...	6	...	...
...	7	...	...
...	8	...	...
...	9	...	...
...	10	...	...
...	11	...	...
...	12	...	...
...	13	...	...
...	14	...	...
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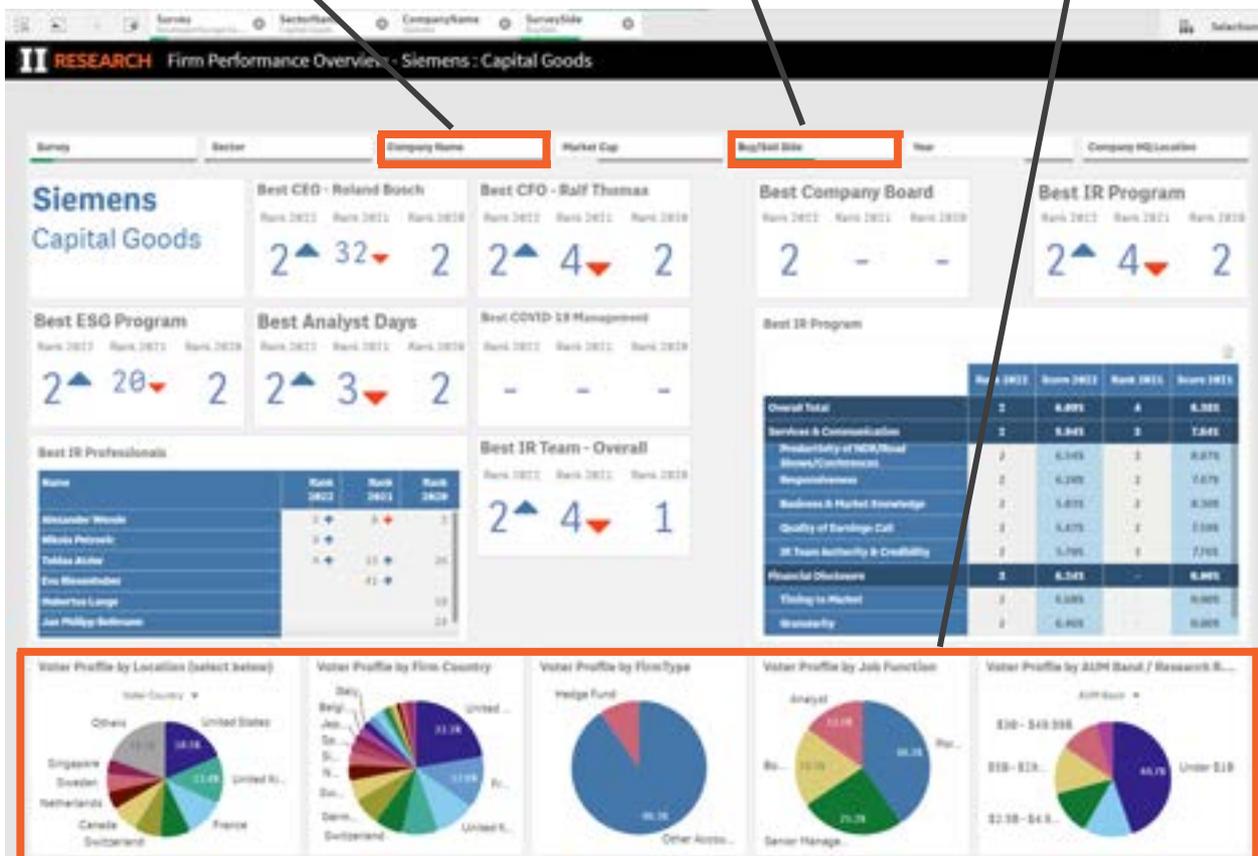
# IR Study Results Dashboard: Firm Performance Overview

- Open the IR Study Results Dashboard.
- This first sheet summarises key results for a specific Company.
- The dashboard will default to your Company with results relative to your Sector Peers.
- Depending on the access you have purchased you can view other Companies results in your own or other sectors.
- You can also view your results relative to other peer groups such as UK Large Cap companies rather than just your sector (using the filter bar selectors).

Select Company Name (or default to your own) and Peer Group filters

Select Voters (Buy/Sell side or all)

Use interactive voter profile charts to further segment results



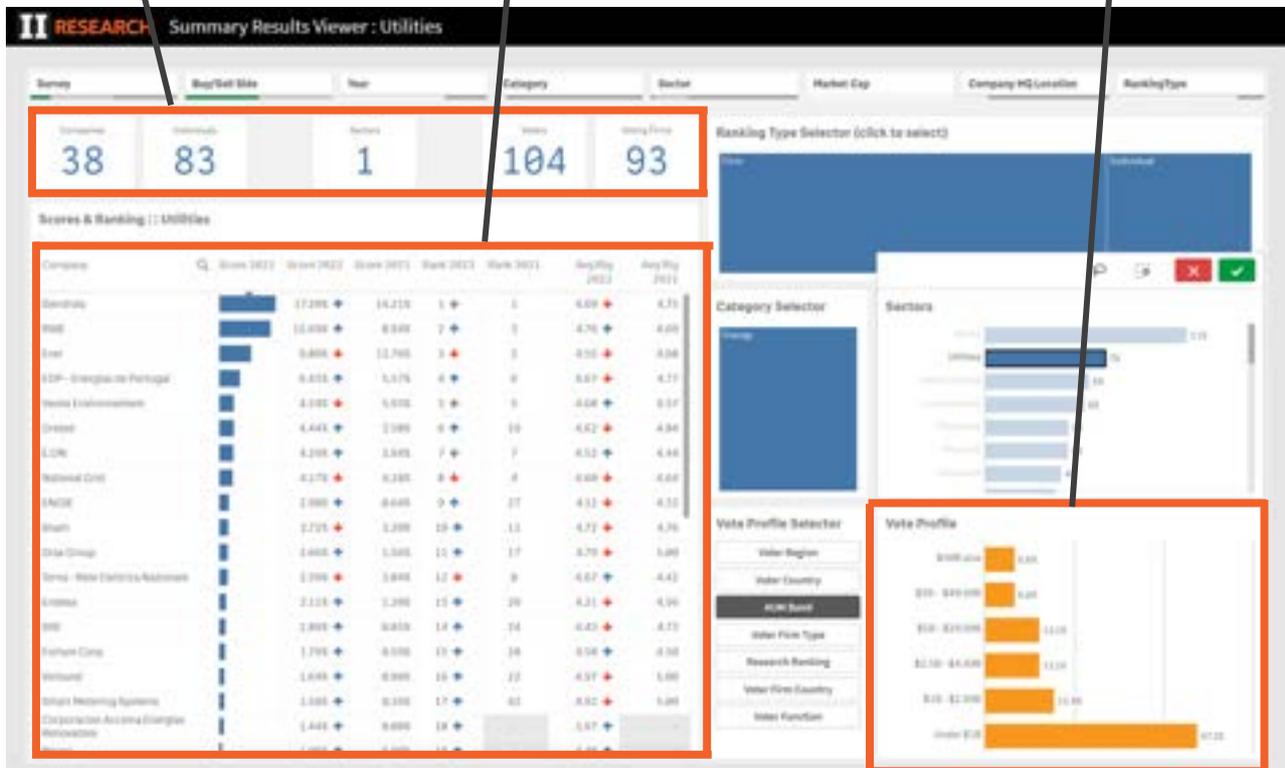
# IR Study Results Dashboard: Summary Results Viewer

- This sheet provides a simple and powerful tool to explore survey results (access depending).
- The Ranking Type Selector chart allows you to drill down into Firm vs Individual level results and then deeper into individual Ranking Types (eg Best CEO) and down to specific attribute level results.

Survey and Voter Universe figures

Results Table

Use interactive voter profile charts to further segment results



# IR Study Results Dashboard: Voter Demographics vs Peer Groups

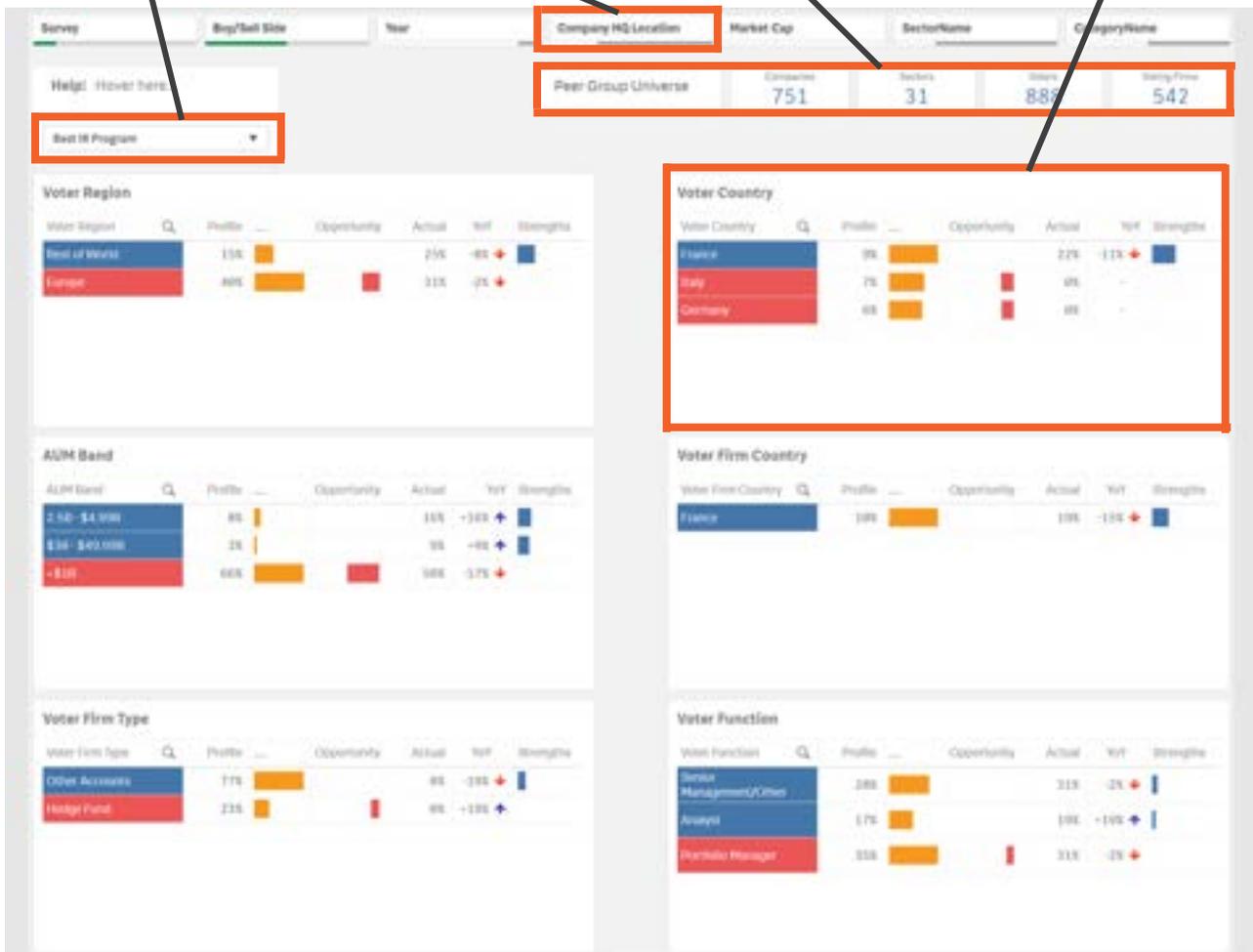
- This sheet provides a summary, by voter profiles, of the demographics where your firm is receiving votes relative to your peers.
- Using the filters at the top of the sheet you can select a Peer group (e.g. your Sector or Company HQ Location).
- The size of the peer group universe is shown in the counts at the top of the sheet.
- Select a Ranking Type (e.g. Best IR Program).
- The charts then intelligently highlight the segments of the demographic where your vote profile significantly differs from the peer group average.

Ranking Type Selector

Voter & Peer Group filters

Peer Group & Voter Universe counts

Charts shows 'Strengths' and 'Opportunities' by voter segments



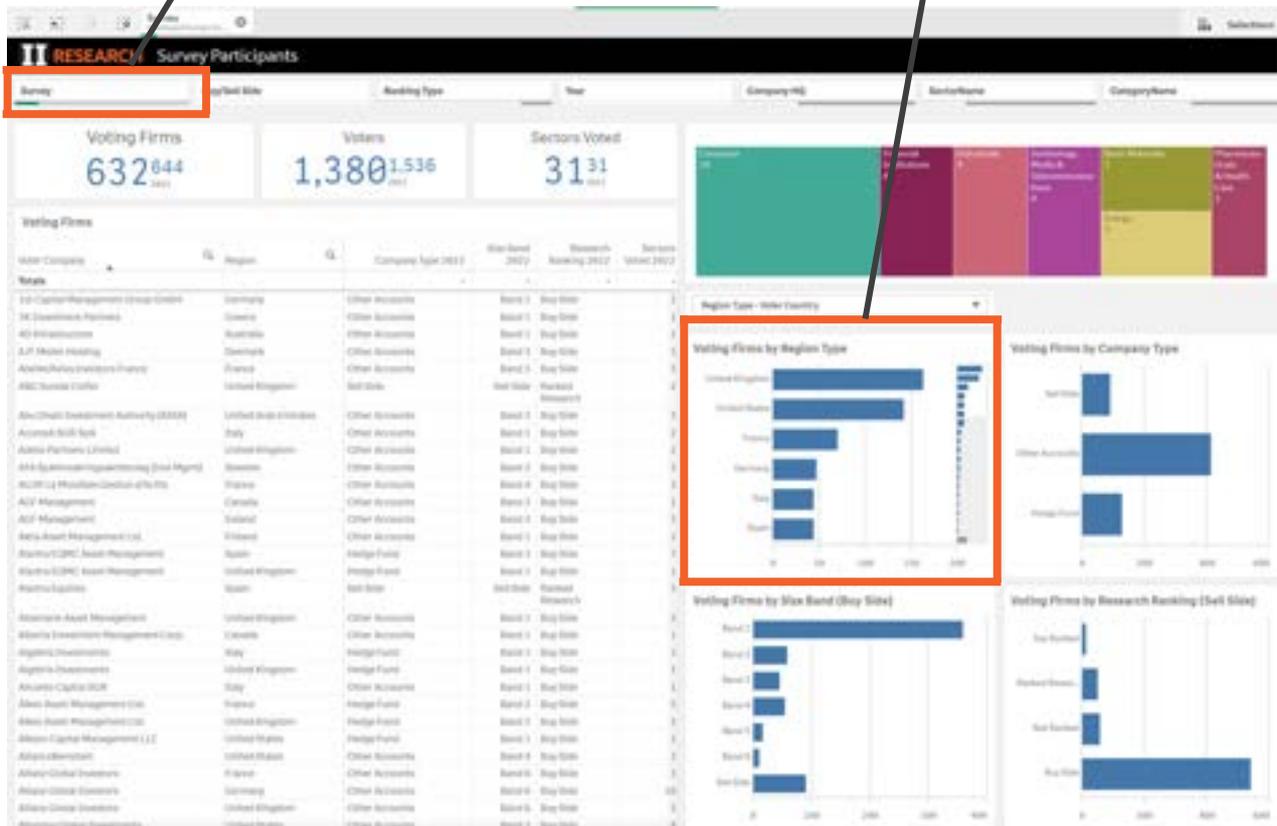


# IR Study Survey Participants Dashboard

- Open the IR Study – Survey Participants dashboard (second from the Qlik Hub screen) to see all Firms that contributed to the results
- Filter the list by demographics using the filter bar or the interactive charts to identify specific participant segments

Survey Selection

Interactive charts (and Region Type selector drop down)



# Equity Research Results Summary Dashboard (Top Sell-Side Firms & Analysts)

- Open the Sell-Side Equities Research Results Summary dashboard (from the Qlik Hub screen) to see full details of the Research Rankings across your available Surveys and Sectors.
- If you have access to multiple Surveys and Sectors, use the filter bar to select the rankings you wish to view.
- Separate pages show:
  - Firm level rankings
  - Individual Analyst rankings

Research Survey Selection

Filter Bar

