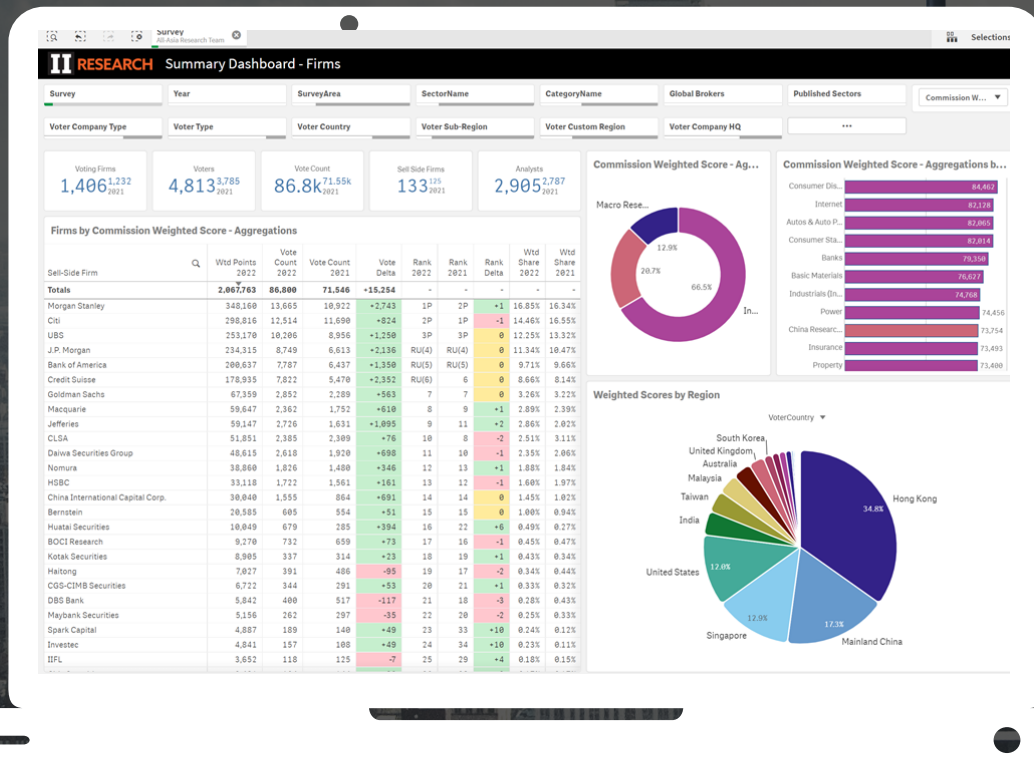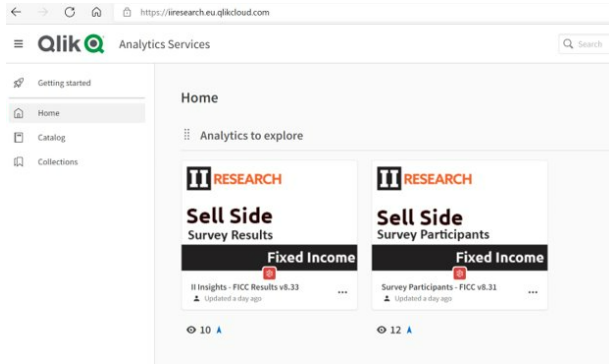# II RESEARCH

II INSIGHTS DASHBOARD
QUICK START USER GUIDE

Research Providers

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

# Institutional Investor

Opening the Dashboards

Two core dashboards will be available on the main page. One consists of the Survey Results, the other shows a detailed list of Buy Side Participants who voted in the survey.

Tip #1: Often useful to open both dashboards side by side in new tabs.

Tip #2: Understanding who voted in previous surveys can be helpful in preparing for the survey and marketing communications.

Summary Dashboard - Firms
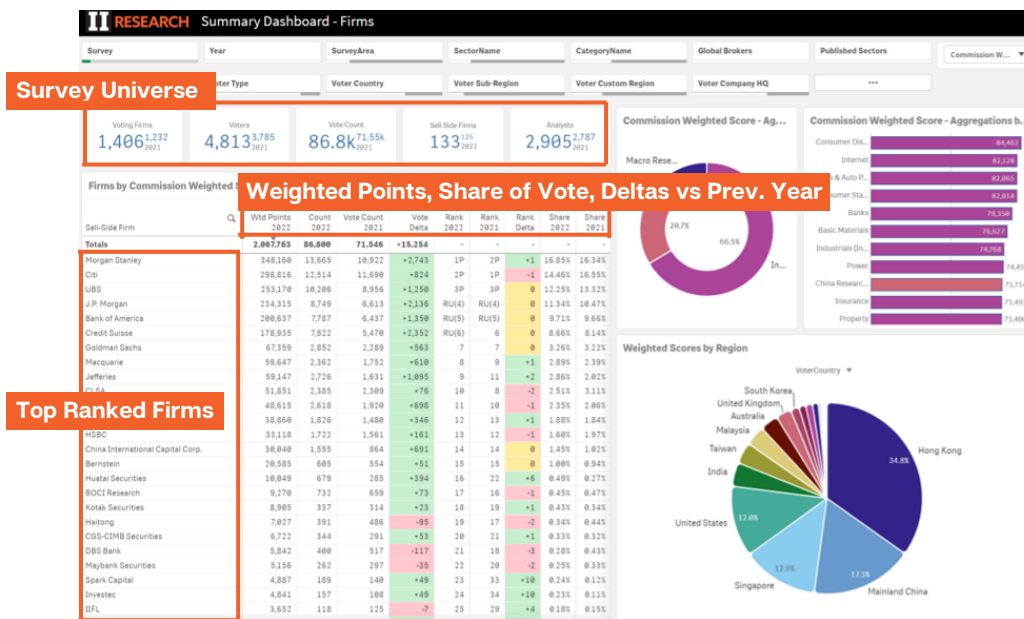
- Slice & Dice capability to click and delve deeper into data by using various filters.
- Layer several dimensions together (for example Region and Size Band).
- These filters are applied by using the selection boxes at the top of the screen or by clicking directly into the charts.

Buy Side Participants
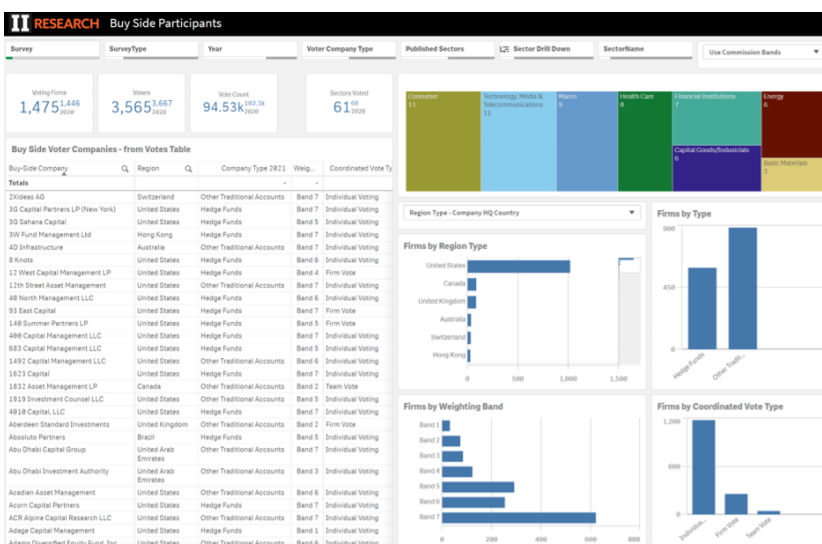
- Open Survey Participants App (second dashboard app from the Qlik Hub screen list to utilise with Analytics).
- Filter list by demographics to identify specific voter segments.
- First sheet can be used for undertaking analysis in conjunction with the Results Dashboards.
- Second sheet (Buy Side Participants - Sectors) provides a complete downloadable list of Voting Firms, including the Sector voted on.
- Dropdown function available in the Voter Region chart, which can be used to change to Voter Sub Region or Voter Custom Region.

II RESEARCH

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 the top left of screen.
- Page/Sheet navigation controls are at the top right of screen.
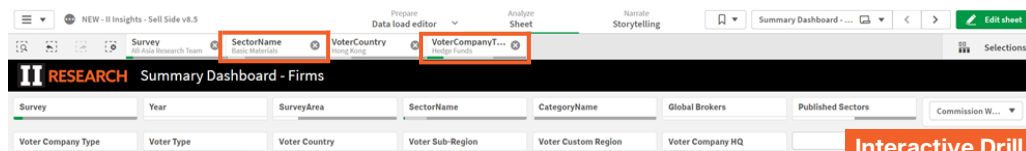- Once filters are in place in one tab they carry over and apply in other tabs.
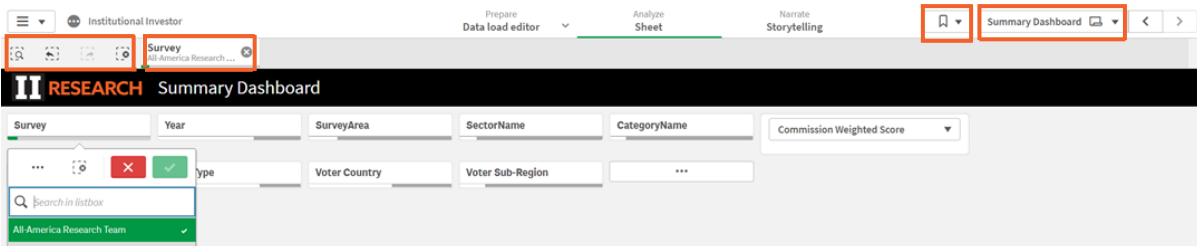
Summary Dashboard - Firms: Drill Deeper

- Results reconfigured based on interactive drill down & filters.
- The filter bar at the top of the screen contains two rows of filters.
- The first row controls the Survey level attributes, Survey name, Sector, Categories etc.
- The second row controls voter profile level attributes, Voter Company Type, Voter location etc.
- Filter the results by a specific Sector and/or explore the results by specific voter profiles
  (e.g. UK based Hedge Fund voters).

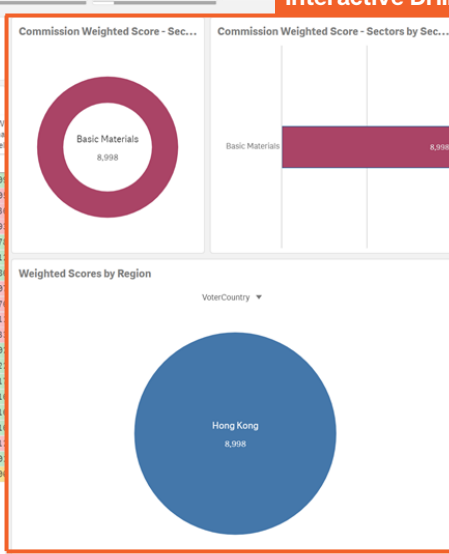# Summary Dashboard Extended Data (Beta Version)

An alternative view of the Summary Page is now available for Beta testing.

- Show/Hide switches allow additional data points to be displayed as required.
- The new page allows you to configure the information you wish to display, new data points include:
- Ratings: The percentage of votes received with ratings/scores of 5, 4, 3, 2 or 1. This can be effectively used to understand the quality of the votes, (5 denotes high quality).
- Benchmark: The delta in the weighted score/points to achieve a published position is shown (e.g. how far away from the published position).
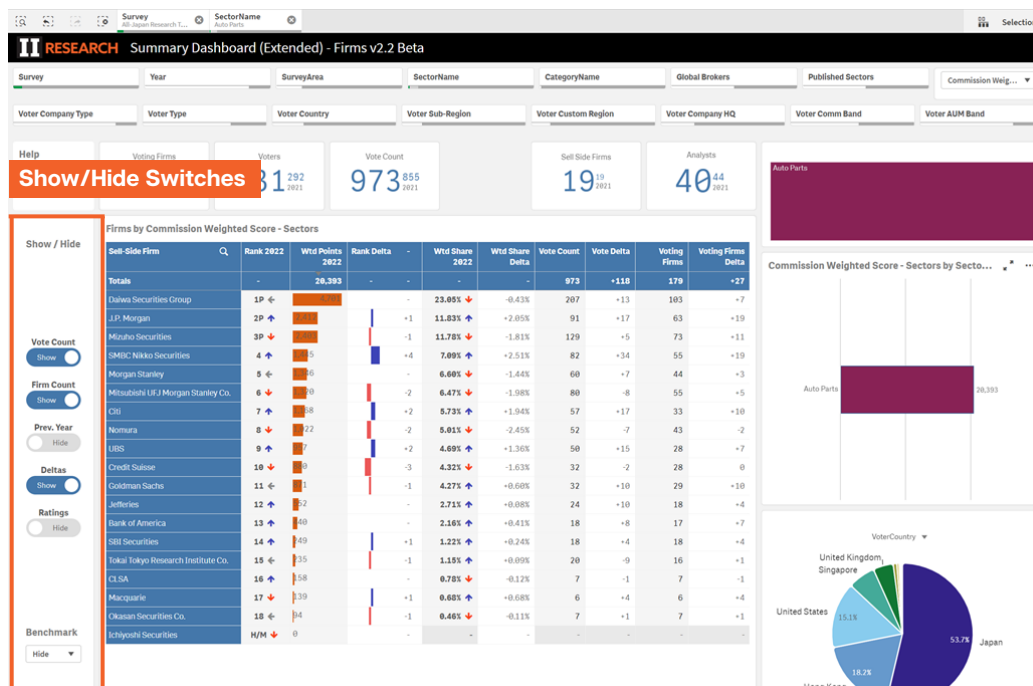

Detailed Firm Focus: All your Firm's Key Results in One Sheet

A single sheet that pulls together key information for an individual firm across:
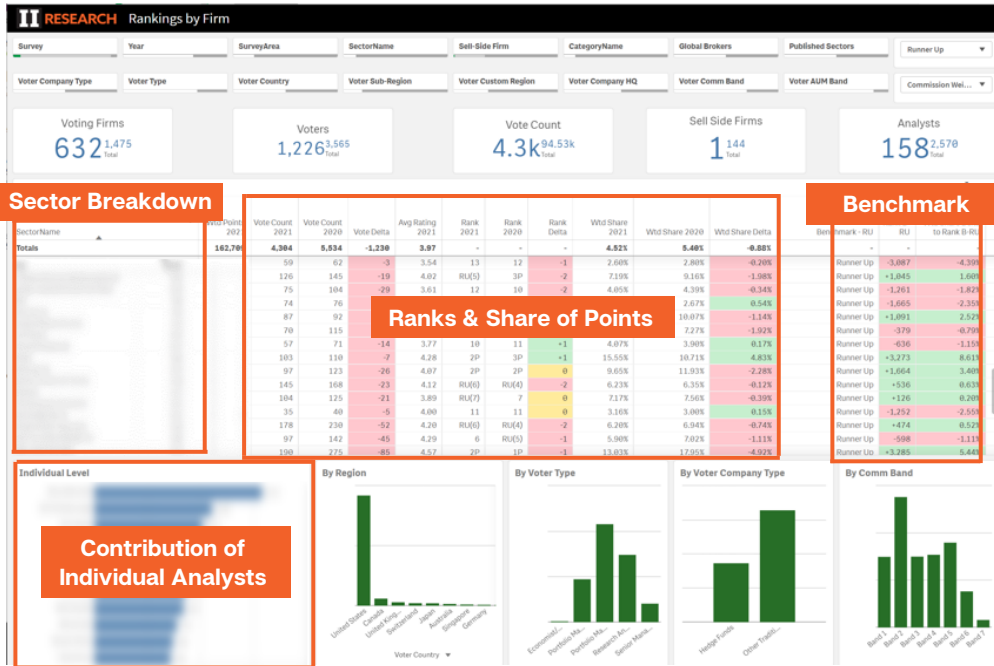Overall Results, Sector Results, Analyst Results and Voter Profiles.

- Red & Green indicators on both the Category/Sector block chart and the Voter Profiles shown in the image below illustrate a change in rankings from the previous year.
- Any Sell Side firm can be chosen to determine competitors strengths and weaknesses.

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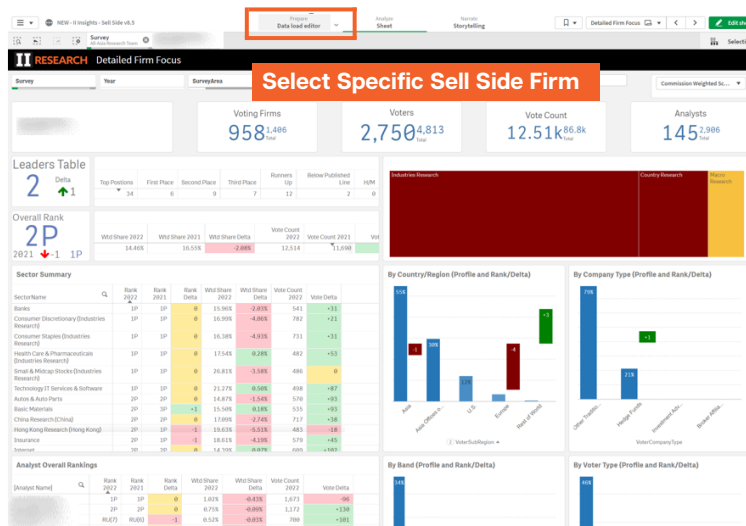
Rankings By Firm - Sector by Sector Details and Benchmarks

This page is where you can view *Sector by Sector details per specific firm.*
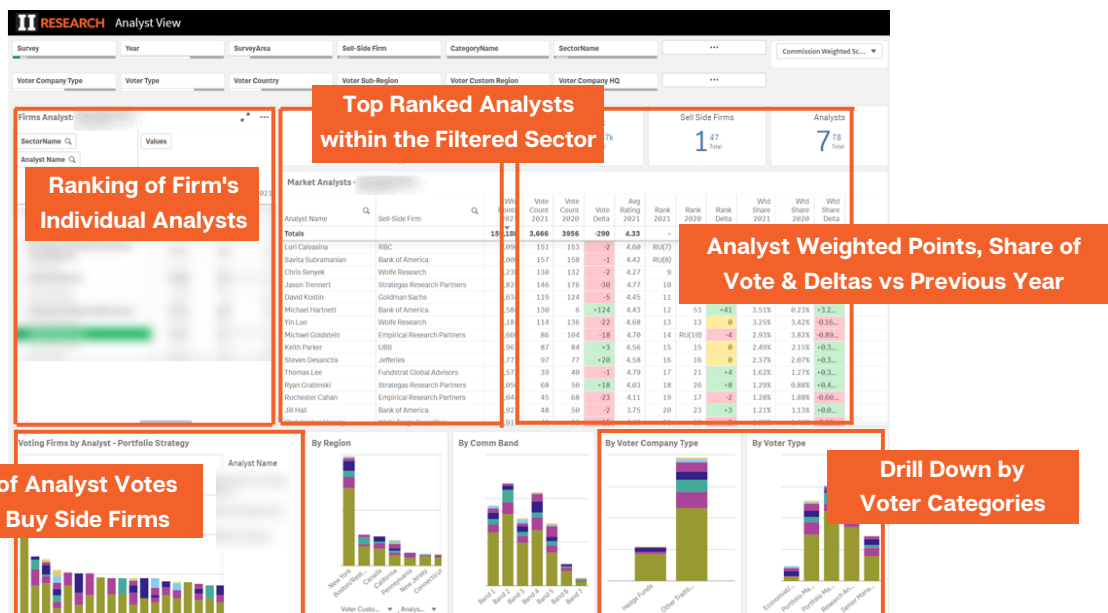
- Select the Sell Side firm using the filter bar drop down.
- Use the benchmark filter on the top right to set the ranked position to benchmark against (1P, 2P, 3P, Runner up, 10P).
- Runner up is the most commonly used filter as 1P through runner up all contribute to the Leaders Table. Runner up is the lowest threshold to cross to get onto the Leaders Table.

Analyst View:
Firm Specific Rankings and Votes Profile

This page is where you can view *Individual Analyst results.*

- Select the Sell Side firm to analyse using the filter bar drop down.
- Select an individual sector, either directly from the table of results or the filter bar 'Sector Name' filter, to review analyst detailed results and voter profiles.

Vote Construction (vs Market):
Vote Profile vs Market/Peers

Here you can analyse *profile of votes received vs peers & market average.*

- Select the Sell Side firm to analyse using the filter bar drop down.
- Review and compare the firms voter profiles (Blue bars) vs the overall survey profiles (red dots).
- This is useful to better understand strengths and weaknesses of coverage in specific areas.
- Further sheets allow comparisons against specific peer groups rather than the complete survey population.