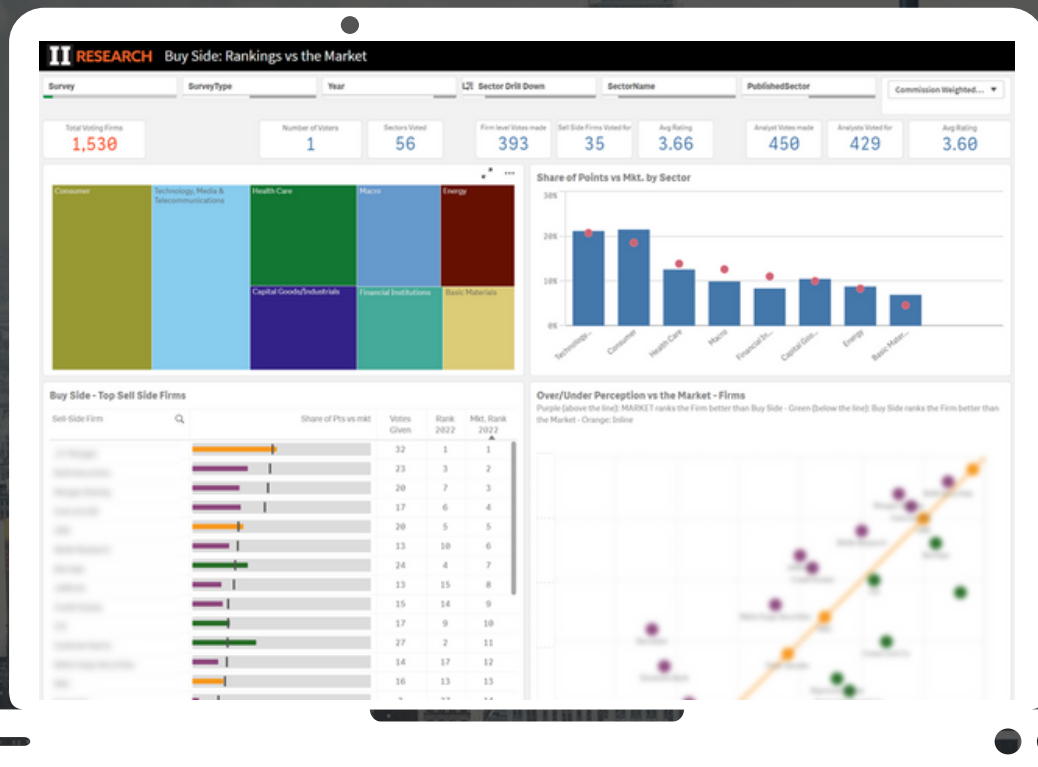


# II INSIGHTS DASHBOARD

## QUICK START USER GUIDE

### Buy-Side Users

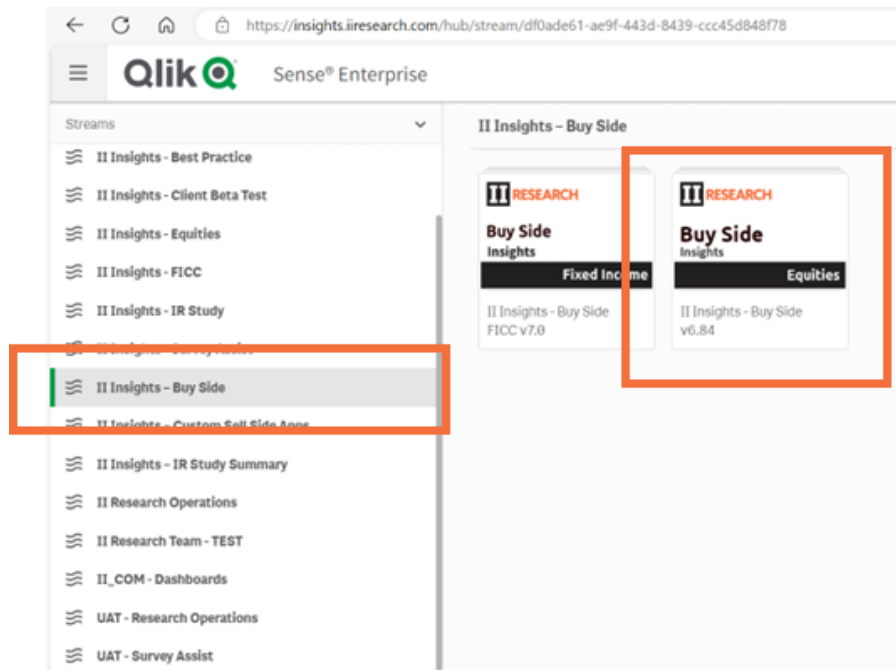


*The Dashboard is designed to explore survey data, providing qualitative market evaluations and unique insights relative to your own vote submissions*

INSTITUTIONAL  
INVESTOR

## Opening the Dashboard

- Using the left hand drop down menu: scroll down to II Insights - Buy Side
- Click on the **Buy Side Insights Equities** icon to begin.



- Select your required dashboard sheet.

A screenshot of the Qlik Sense dashboard. The top header shows 'Qlik Sense Enterprise' and 'II Insights - Buy Side v6.84'. Below the header, there's a section for 'Public sheets (6)'. The first sheet, 'Research Survey Summary - Firms', is highlighted with an orange rectangle. To the right of the sheets list, there's a list of results and insights.

**Firm level results:** Aggregated and Sector by Sector.

**Analyst level results:** Aggregated and Sector by Sector.

**Voter profile and participation level**

**Research provider evaluation:** Benchmark own against the market.

**Gains and losses in Rank and Market share**

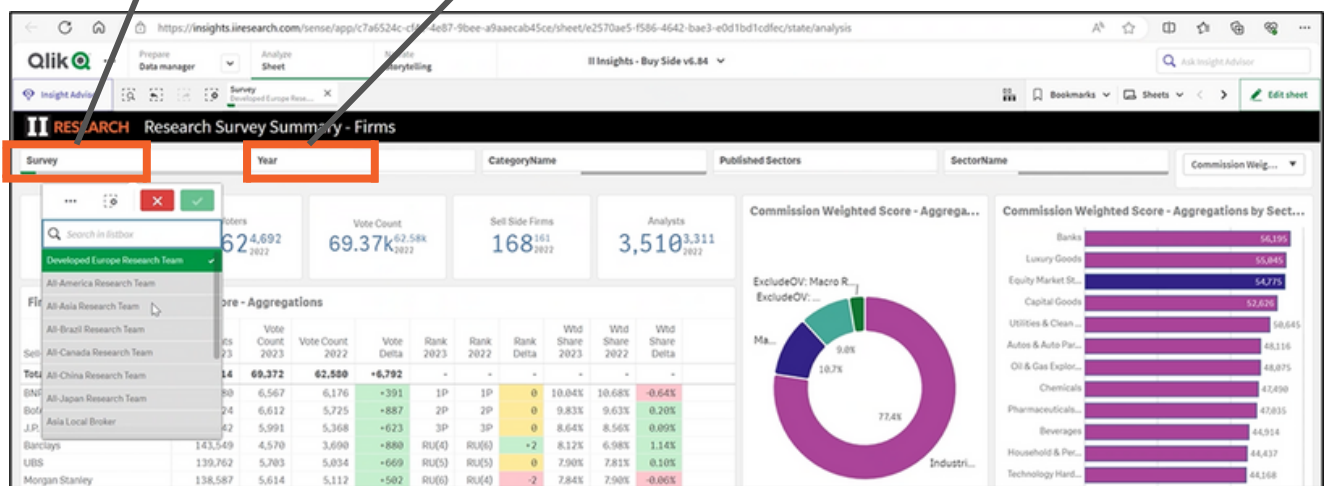
**Gains and losses in Rank and Sector weights**

## Full Survey Results & Rankings - Region & Date

- **Survey** drop down menu: Access data across multiple regions depending on vote submission.
- **Year** drop down menu: Access current results or historical data.
- Filter selections:
  - Green – selected item(s)
  - White – available options
  - Grey – not available based on other selection
- Once filters are selected in one tab, they are applied in other tabs.

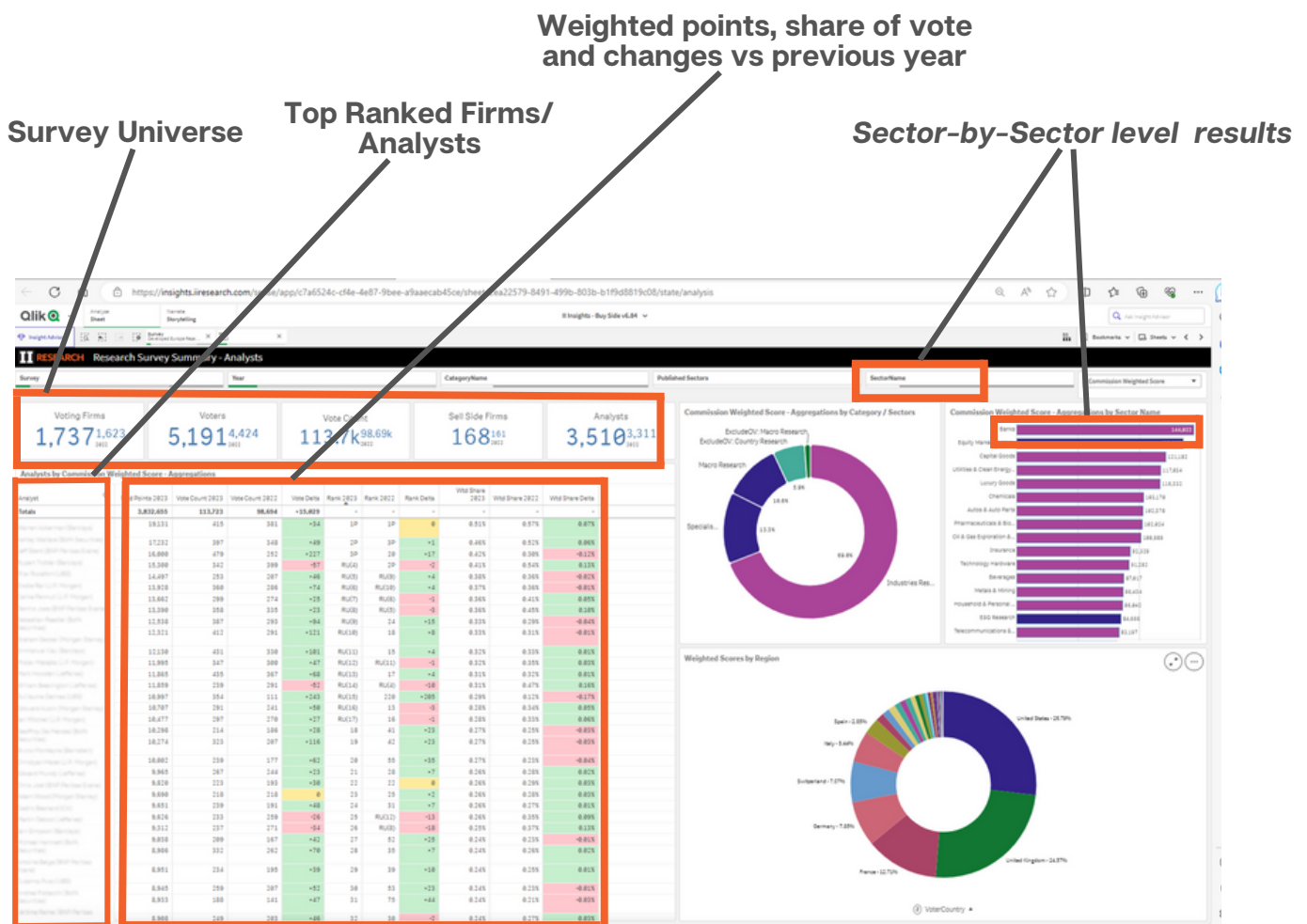
Select Survey Region

Select Survey Year



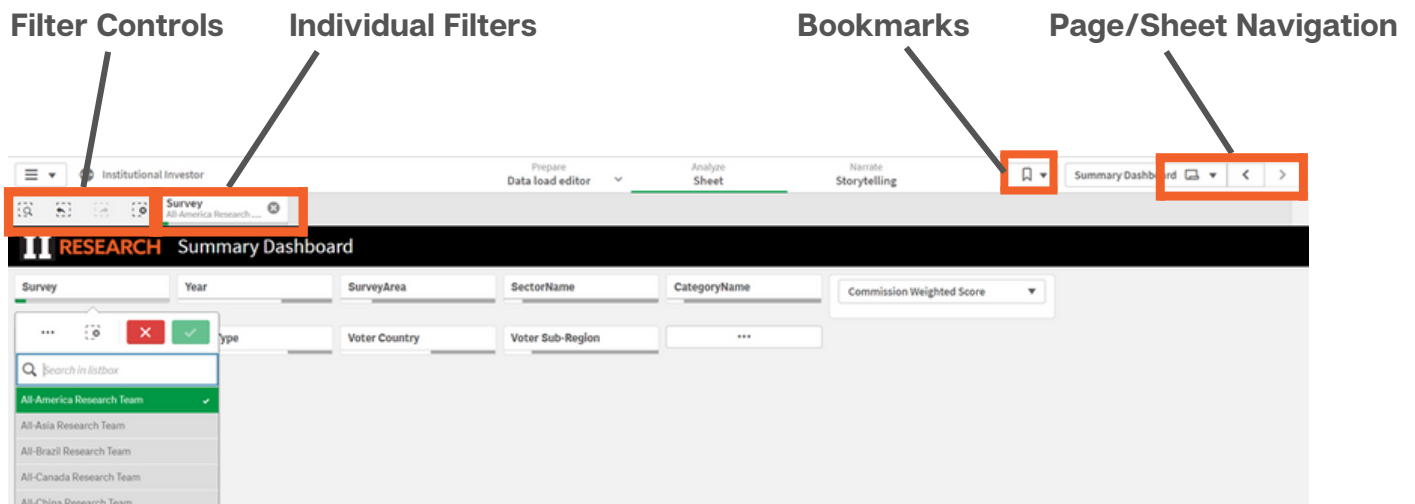
# Full Survey Results & Rankings - Firm & Analysts

- The selected dashboard provides full and detailed results and rankings (not just top level "published" ranks).
- Results are initially displayed at the **Aggregated level**.
- For **Sector-by-Sector level** apply filters with the selection boxes at the top of the screen or by clicking directly into the charts.



## Notes on Filters and Controls

- Basic navigation - filters work the same in all dashboards.
- **Filter controls** (back/fwd/clear all) plus modifying, clearing individual selections are **top left**.
  - Search
  - ← Go back and take it off
  - → put it back on
  - X Clear all
- **Page/Sheet navigation** controls are **top right**.
  - > Next Sheet
  - < Previous Sheet



# Voter Profile & Peer Group Survey Participation

## Voter Profile and Participation Levels:

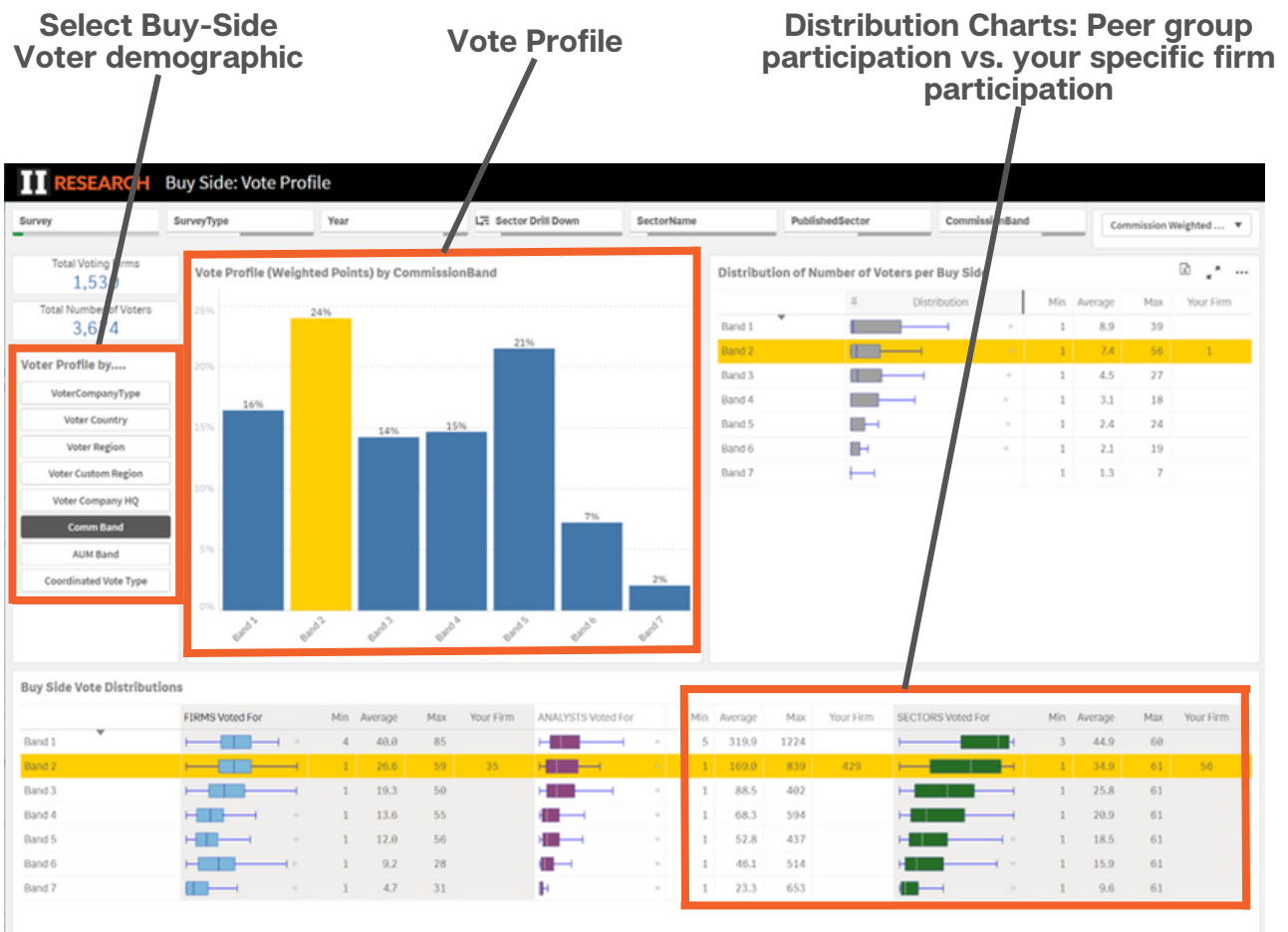
- The sheet displays information about voter profiles and participation levels across various Buy Side demographics.
- Select specific demographics (such as Region or Commission Band) using the options on the left-hand side of the sheet.

## Vote Profile by Demographic:

- The bar chart shows the vote profile for each demographic group (e.g., by Band, Region, or Type).
- Your firm's grouping is highlighted in yellow within the chart.

## Distribution Charts:

- These charts illustrate participation levels in the survey across different peer groups.
- For example, they show the number of firms voted for, the number of sectors that were voted in and the participation level for your own firm.





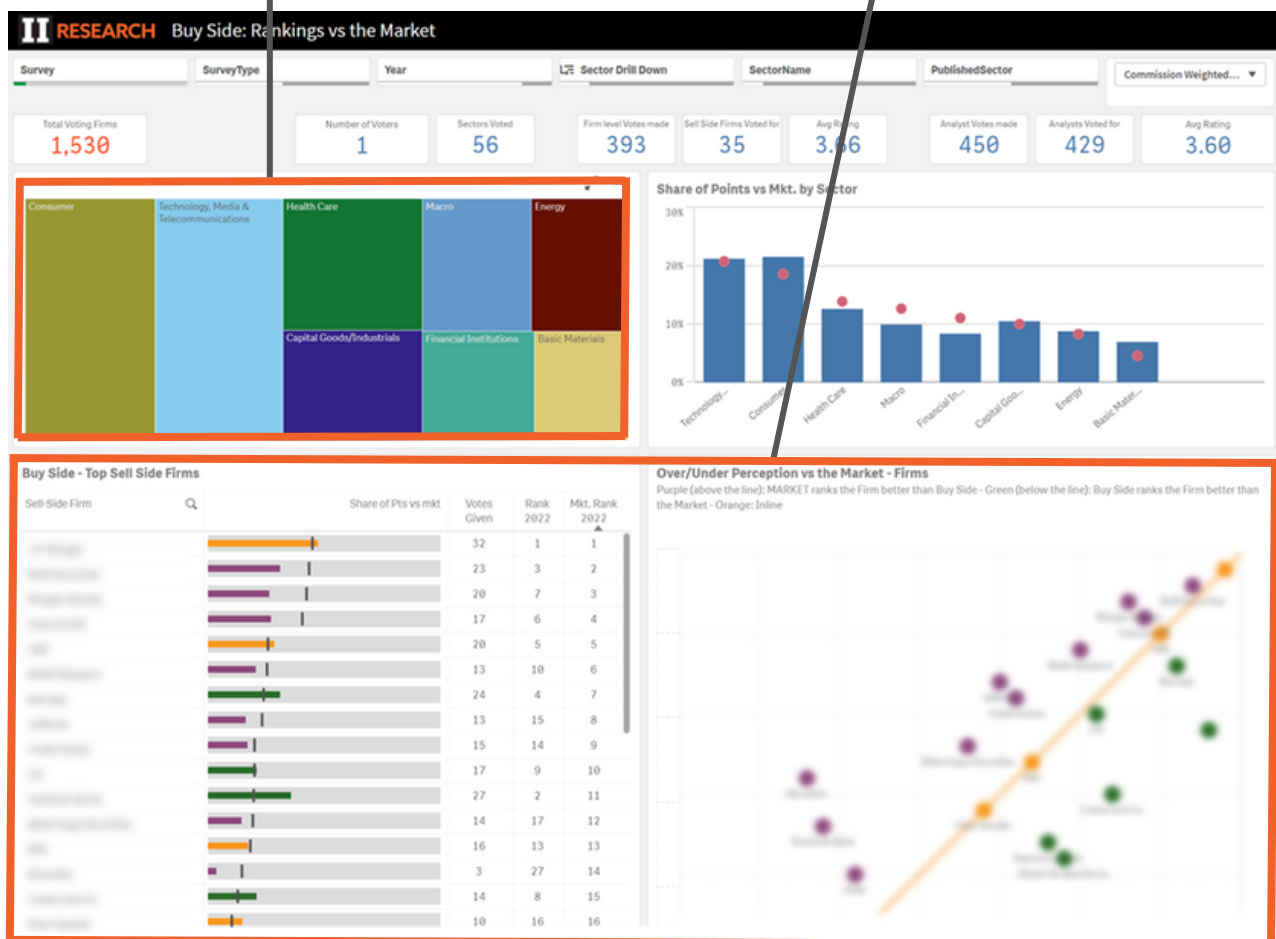
# Broker Evaluation Analysis

This sheet offers a detailed comparison, organized by Sector, between your Research Provider evaluations and the consensus market perception derived from overall results.

- **Left-Hand Table:** sort the results in this table either by your own rankings or by the survey (Market) rankings.
  - **Orange** indicates you rank the broker/provider **inline** with the market.
  - **Green** indicates you rank them **higher** than the market.
  - **Purple** you rank them **lower**.
- **Right-Hand Scatter Chart:** visually represents the same data.
- **Sector-Level Analyst Ranking Comparisons:** These are located further down the sheet. Select a single sector in order to view this information.

Drill down to specific Category or Sectors

Compare your evaluation of Research Providers vs Market perception



Need some help? Get in touch - [marketing@iiresearch.com](mailto:marketing@iiresearch.com)