2023
China
Research Methodology

In partnership with Caixin

Institutional Investor | II RESEARCH

Who we are
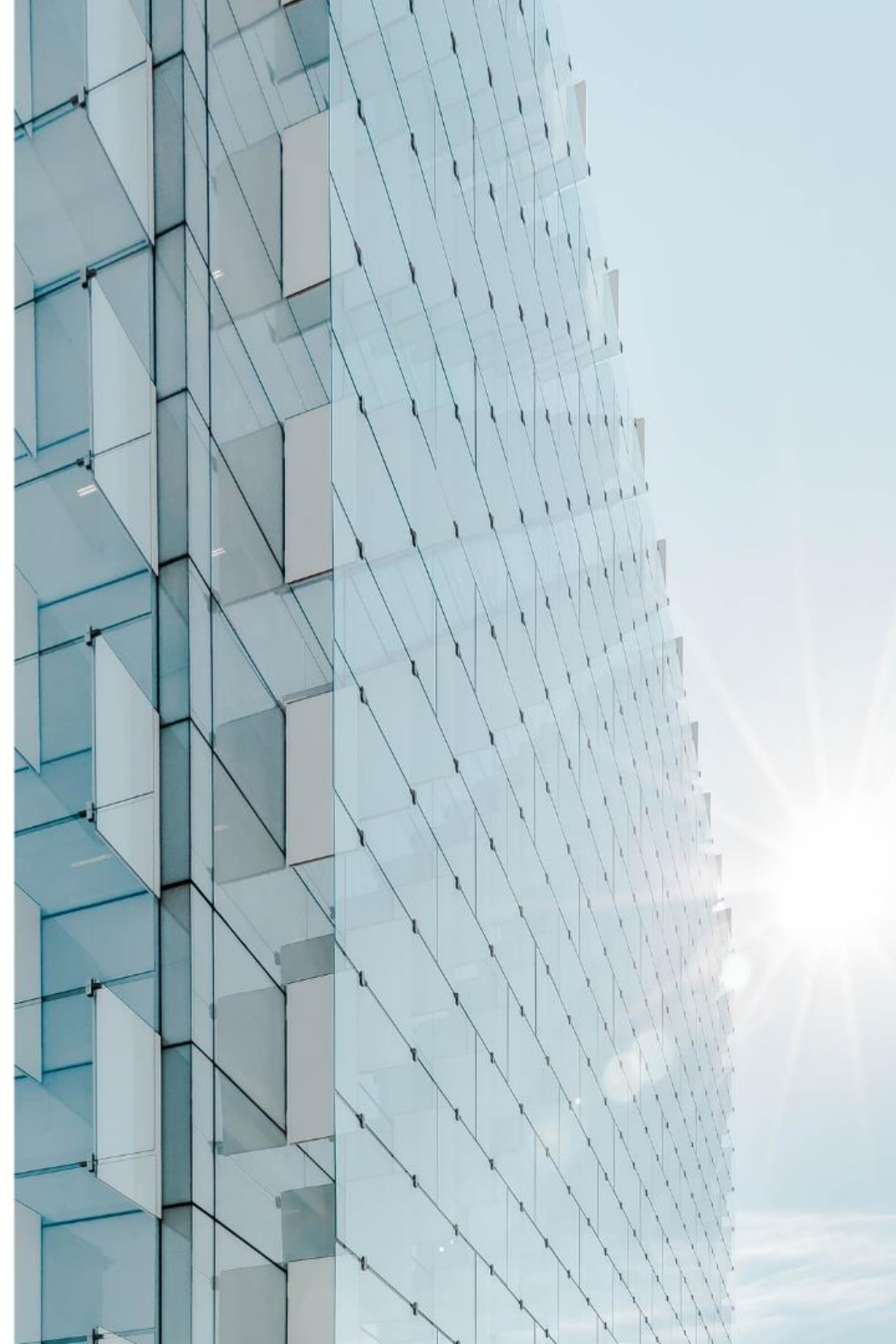
Institutional Investor Research (II Research)

is recognised as the leading provider of independent performance validation and a source of qualitative market intelligence for Corporates and Investment Professionals globally.

RANKINGS

II Research captures detailed qualitative assessments and feedback from investment managers, broker firms and corporate issuers. Through a robust and established methodology, publishes respected rankings across equities, fixed income and corporate investor relations (including C-suite) at a firm and individual level.

DATA

We produce actionable data, based on the performance and market penetration assessments across 10 different global markets. The comprehensive and independent data assists with strategic decision making.

INSIGHTS

Through our proprietary dashboard, II Research delivers unique insights, including detailed peer-to-peer comparative analyses and a spectrum of qualitative measures to assist with resource allocation.

North America

Developed Europe

Asia-Pacific

Emerging EMEA

Latin America

Key Dates - 2023

Analyst Rosters
Opens: 25th July 2023
Closes: 11th August 2023

Sample Ballot
Opens: 25th July 2023
Closes: 22nd September 2023

Polling
Opens: 29th August 2023
Closes: 22nd September 2023

Results
9th January 2024

Note: Times are all UTC+ 8 hours (Hong Kong)

Note: Analysts must be employed at their firms as of the first day of polling (29th August 2023).
Any analysts or salespeople that change firms after that date will be counted at their previous firm.

Participation

Qualification of participants

The table below shows guidance on regional minimums. Please note all minimums apply to the regional equity or fixed-income numbers, not total.

Equity Surveys	AUM		COMMISSIONS
	Traditional Accounts (US$)	Hedge Funds (US$)	All Institutions (US$)
America Research	750m	100m	250k
Asia Research	500m	100m	200k
Developed Europe Equities Research	750m	100m	250k
Japan Research	500m	100m	100k
Emerging EMEA Research	500m	100m	100k
Latin America/Brazil Research	500m	100m	100k
China Research	500m	100m	100k

Fixed Income Research Team Surveys	AUM	
	Traditional Accounts (US$)	Hedge Funds (US$)
America Fixed-Income	750m	100m
Europe Fixed-Income	750m	100m
Other Regional Fixed-Income	750m	100m

INVESTMENT FIRM CRITERIA:

NEW FOR 2023: Only firms on our pre-approved Key Buy-side List will be eligible to participate. New firms will not be added during the survey.

INDIVIDUAL ELIGIBILITY

- Qualified investment professional

- Equity PM, Analyst, Economists for Research

Participation / Band Lists

We aim to increase the number of firms that submit a broker review or coordinate a response at a firm level. This information will be shared within the target participation list. We encourage all buy-side firms to submit a centralized vote or use their research evaluation as the basis for their vote. Sell-side firms are also requested to encourage their clients to participate in this way. This will increase the validity of the results and ensure that the results accurately reflect the market.

Firm Vote (FV)

A direct extract from a buy-side broker vote or research evaluation or a single coordinator for the buy-side will arrange input of the firm ballot. This may be through submission of an Excel file or use of the II Voting Portal as a coordinator. All voting restrictions on the number of firms and analysts are removed, thereby allowing the full broker evaluation process to be reflected through the ballot. II Research makes best efforts to match the evaluation to the II ballot structure. The mapped vote may be returned to the originating firm for review and validation. Individual votes received in the survey outside of the central submission are discarded or *may* be referred to the source for permission to include. Sell-side firms are instructed NOT to lobby these firms for individual votes.
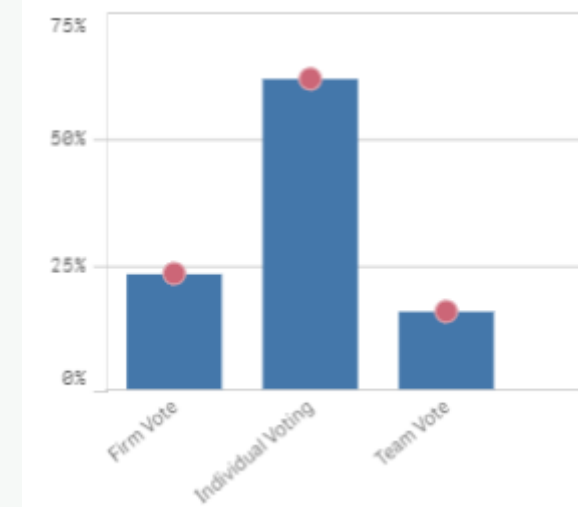
Team Vote (TV)

A buy-side firm may submit a partial vote from a specific team within the whole investment firm. This vote may be enhanced by other individual votes at the firm.
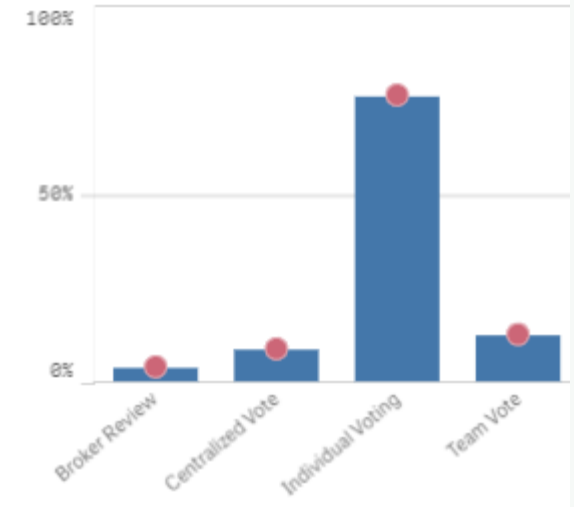
Individual Vote (I)
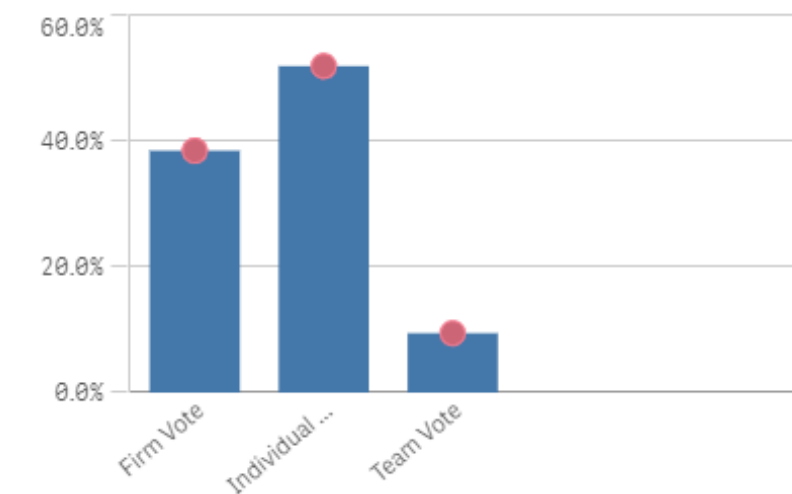
Votes are submitted by individuals at the firm.

Europe: 39%

Asia: 24%

US: 49%

Centralized Vote Mapping

Three Options:

Excel Ballot	Coordinator Access	Broker Vote

Broker Vote

- Supplied to II direct

- Sector & Individual mapping

  - Replicates 5 – 1 rating

  - Possible validation by BLO

  - All different, based on:

    - Consumption

    - Ranking

    - Scores

    - $$ values

Calculating
Results

Leaders' Table

The **Overall Winner** in each survey is based on the concept of a Leaders' Table. i.e. the number of published positions each sell-side firm receives in the survey. The Weighted Leaders' Table assigns a points score to each published place.

LEADERS' TABLE

Number of Published Positions 1st, 2nd, 3rd, Runner Up (R/U)

WEIGHTED LEADERS' TABLE

Points total based on weighted Published Positions 1st, 2nd, 3rd, Runner Up (R/U)

1st Place	= 4 points
2nd Place	= 3 points
3rd Place	= 2 points
Runner Up	= 1 point

Below Published Line (BPL): Placed but not a "Published" Position
Honourable Mention (H/M): Received votes but less than five

PUBLICATION : WE WILL PUBLISH ONLINE THE FOLLOWING FOUR TABLES:

1. AUM-weighted firm ranking
2. AUM-weighted analyst ranking

The AUM-weighted firm Leaders' Table will contribute to the Global Leaders'Table.

Methodology: Firm Ratings

Firm Ratings: One voter in a sector

VOTER 1

Rating	Firm	Points
5	Broker A	5
5	Broker B	5
4	Broker C	4
4	Broker D	4
3	Broker E	3
2	Broker F	2
1	Broker G	1

Each firm rating is converted to a score, for a total of 24 points. The points are then multiplied by the AUM weighting of the firm.

Firm Ratings: Two voters at the same firm, voting in the same sector

VOTER 1

Rating	Firm	Points
5	Firm A	5
5	Firm B	5
4	Firm C	4
4	Firm D	4
3	Firm E	3
2	Firm F	2
1	Firm G	1

VOTER 2

Firm	Sum of Ratings (Voter 1 + Voter 2)	% of Total (Sum divided by Total)	Final Point Total (% multiplied by 24)
Firm A	9	19%	4.5
Firm B	10	21%	5
Firm C	7	15%	3.5
Firm D	9	19%	4.5
Firm E	7	15%	3.5
Firm F	4	8%	2
Firm G	2	4%	1
Total	48	100%	24

Ratings are converted to a score and totalled for every sell-side firm receiving a vote. Each sell-side firm's percentage of the total sum is calculated. This percentage is multiplied by 24 points, to determine how many unweighted points each sell-side firm will receive. The points are then multiplied by the AUM weighting of the firm.

Methodology: Firm Ratings

Firm Ratings: One voter with three ratings

VOTER 1

Rating	Firm
5	Firm A
4	Firm B
2	Firm C

	Sum of Ratings (Voter 1 + Voter 2)	% of Total (Sum divided by Total)	Final Point Total
Firm A	5	45%	5
Firm B	4	36%	4
Firm C	2	18%	2
Total	11	100%	11.0

Because the total sum of ratings is less than 24 points, the percentages are multiplied by the total sum of ratings (11) rather than 24.

Firm Ratings: Multiple voters at the same firm, voting in the same sector

Rating	Firm	Firm	Firm	Firm	Firm	Firm	Firm	Firm	Firm	Firm
5	Firm A	Firm H	Firm I		Firm A	Firm A	Firm A	Firm A	Firm A	Firm C
5	Firm B	Firm B				Firm C	Firm D	Firm B	Firm F	Firm E
4	Firm C	Firm D								
4	Firm D	Firm A			Firm H		Firm C	Firm F		Firm A
3	Firm E	Firm E			Firm E		Firm F			
2	Firm F	Firm C			Firm C			Firm C	Firm C	Firm F
1	Firm G	Firm F		Firm I	Firm G					Firm G

Firm	Sum of (Voter 1 Ratings + Voter 2)	% of Total (Sum divided by Total)	Final Point (% multiplied Total by 24)
Firm A	38	27%	6.5
Firm B	15	11%	2.6
Firm C	26	18%	4.4
Firm D	13	9%	2.2
Firm E	14	10%	2.4
Firm F	17	12%	2.9
Firm G	3	2%	0.5
Firm H	9	6%	1.5
Firm I	6	4%	1.0
Total	141	100%	24

Ratings are converted to a score and totalled for every sell-side firm receiving a vote. Each sell-side firm's percentage the total sum is calculated and multiplied by 24 points to determine how many unweighted points each sell-side firm will receive. The points are then multiplied by the AUM weighting of the firm.

Methodology: Firm Ratings

Analyst Ratings: One voter in a sector, voting for analysts at one firm

VOTER 1

Rating	Firm	Points
5	Analyst A	5
4	Analyst B	4
3	Analyst C	3
2	Analyst D	2
1	Analyst E	1

Each firm rating is converted to a score, for a total of 15 points.

Analyst Ratings: Two voters from same voting firm in a sector, voting for analysts at a total of three firms

VOTER A

Sell-Side Firm 1		Sell-Side Firm 2	
5	Analyst A	5	Analyst 1
4	Analyst B	4	Analyst 2
3	Analyst C	3	Analyst 3
2	Analyst D	2	Analyst 4
1	Analyst E	1	Analyst 5

VOTER B

Sell-Side Firm 1		Sell-Side Firm 3	
5	Analyst F	5	Analyst X
4	Analyst A	4	Analyst Y
3	Analyst B		
2	Analyst C		
1	Analyst D		

Firm	Sum of Ratings + Voter 2)	% of Total (Sum divided by Total)	Final Point Total by 15*3) (% multiplied)
Analyst A	9	17%	7.5
Analyst B	7	13%	5.8
Analyst C	5	9%	4.2
Analyst D	3	6%	2.5
Analyst E	1	2%	0.8
Analyst F	5	9%	4.2
Analyst 1	5	9%	4.2
Analyst 2	4	7%	3.3
Analyst 3	3	6%	2.5
Analyst 4	2	4%	1.7
Analyst 5	1	2%	0.8
Analyst X	5	9%	4.2
Analyst Y	4	7%	3.3
Total	54	100%	45

Max. number of points (before Commission/AUM weighting is applied) that this voting firm is able to give in a sector is determined by multiplying the number of sell- side firms at which they rated analysts and multiplying by 15. In this example, the voting firm can give a max. of 45 points (15*3).

Analysts ratings are converted to a score and totalled for every analyst receiving a vote. Each analyst's % of total sum is calculated and multiplied by 45 points to determine how many unweighted points each sell- side firm will receive. The points are then multiplied by the AUM weighting of the firm.

China
Research Survey
Structure

Voter Universe: Assets Under Management

2023 All-China Research Team Report: Firm Results - Overall

Response Rates	2023	2022	2021
Number of Firms	468	975	953
Number of Individuals	2,218	3,160	2,812
Number of Votes	32,972	35,988	33,688

	Weighted			Unweighted		
Voter Region	2023	2022	2021	2023	2022	2021
China	47%	51%	48%	48%	51%	46%
Rest of Asia (ex-China)	22%	21%	24%	24%	25%	28%
Asia (ex-China) Offices of Nondomestic Firms	14%	11%	13%	14%	10%	10%
U.S./Canada/Europe	8%	8%	8%	5%	6%	8%
China Offices of Non-China Firms	9%	8%	7%	9%	9%	8%

	Weighted			Unweighted		
Voter Function	2023	2022	2021	2023	2022	2021
Portfolio Manager	24%	24%	22%	23%	24%	21%
Analyst	57%	56%	52%	63%	59%	58%
Both	12%	13%	19%	8%	9%	13%
Senior Management/Other	5%	6%	5%	5%	6%	6%
Economist/Strategist	2%	1%	2%	2%	1%	2%

	Weighted			Unweighted		
Asset Size	2023	2022	2021	2023	2022	2021
>=$5B	46%	39%	42%	17%	8%	9%
$1B - $4.99B	32%	28%	28%	23%	13%	13%
$.5B - $.99B	7%	8%	8%	10%	6%	7%
$.3B - $.49B	5%	7%	7%	12%	8%	9%
<$.3B	9%	18%	16%	38%	65%	62%

	Weighted			Unweighted		
Institution Type	2023	2022	2021	2023	2022	2021
Hedge Funds	12%	12%	11%	37%	29%	27%
Other Accounts	88%	88%	89%	63%	71%	73%

Voter Universe: Assets Under Management

2023 All-China Research Team Report: Analyst-Based Results - Overall

Response Rates	2023	2022	2021
Number of Firms	468	955	923
Number of Individuals	2,179	3,067	2,703
Number of Votes	68,402	68,046	60,177

	Weighted			Unweighted		
Voter Region	2023	2022	2021	2023	2022	2021
China	48%	52%	50%	48%	50%	46%
Rest of Asia (ex-China)	22%	21%	24%	25%	25%	28%
Asia (ex-China) Offices of Nondomestic Firms	14%	12%	13%	14%	10%	11%
U.S./Canada/Europe	6%	6%	6%	5%	6%	7%
China Offices of Non-China Firms	9%	9%	7%	9%	9%	9%

	Weighted			Unweighted		
Voter Function	2023	2022	2021	2023	2022	2021
Portfolio Manager	24%	24%	22%	23%	24%	21%
Analyst	59%	57%	54%	63%	59%	58%
Both	10%	12%	18%	8%	9%	13%
Senior Management/Other	4%	6%	4%	5%	6%	6%
Economist/Strategist	2%	1%	1%	2%	1%	1%

	Weighted			Unweighted		
Asset Size	2023	2022	2021	2023	2022	2021
>=$5B	50%	43%	45%	17%	9%	9%
$1B - $4.99B	31%	26%	26%	23%	13%	13%
$.5B - $.99B	6%	8%	8%	10%	6%	7%
$.3B - $.49B	5%	6%	7%	12%	8%	9%
<$.3B	8%	17%	14%	38%	65%	61%

	Weighted			Unweighted		
Institution Type	2023	2022	2021	2023	2022	2021
Hedge Funds	11%	11%	11%	37%	29%	27%
Other Accounts	89%	89%	89%	63%	71%	73%

Voter Universe: Assets Under Management

2023 All-China Research Team Report: Firm-Based Results – Mainland China

Response Rates	2023	2022	2021
Number of Firms	245	491	464
Number of Individuals	1,267	1,866	1,508
Number of Votes	17,405	19,089	15,998

	Weighted			Unweighted		
Voter Region	2023	2022	2021	2023	2022	2021
Beijing	26%	26%	24%	31%	29%	28%
Shanghai	40%	44%	45%	36%	42%	41%
Shenzhen	12%	11%	13%	12%	11%	12%
Rest of China	4%	3%	3%	5%	4%	4%
China Offices of Non-China Firms	18%	16%	14%	16%	15%	15%

	Weighted			Unweighted		
Voter Function	2023	2022	2021	2023	2022	2021
Portfolio Manager	23%	25%	25%	22%	25%	22%
Analyst	65%	61%	59%	67%	63%	63%
Both	6%	8%	12%	6%	7%	10%
Senior Management/Other	5%	6%	4%	4%	6%	5%
Economist/Strategist	1%	-	1%	1%	-	1%

	Weighted			Unweighted		
Asset Size	2023	2022	2021	2023	2022	2021
>=$5B	54%	49%	54%	23%	13%	14%
$1B - $4.99B	30%	26%	23%	27%	16%	15%
$.5B - $.99B	7%	8%	8%	10%	7%	8%
$.3B - $.49B	4%	5%	5%	10%	8%	9%
<$.3B	6%	12%	10%	29%	57%	53%

	Weighted			Unweighted		
Institution Type	2023	2022	2021	2023	2022	2021
Hedge Funds	10%	8%	8%	29%	24%	20%
Other Accounts	90%	92%	92%	71%	76%	80%

Voter Universe: Assets Under Management

2023 All-China Research Team Report: Analyst-Based Results – Mainland China

Response Rates	2023	2022	2021
Number of Firms	244	486	460
Number of Individuals	1,243	1,807	1,457
Number of Votes	39,349	39,891	31,854

Voter Region	Weighted			Unweighted		
	2023	2022	2021	2023	2022	2021
Beijing	26%	26%	25%	31%	29%	28%
Shanghai	40%	45%	45%	36%	42%	41%
Shenzhen	13%	10%	14%	13%	11%	11%
Rest of China	5%	3%	3%	5%	4%	4%
China Offices of Non-China Firms	16%	15%	13%	16%	15%	16%

Voter Function	Weighted			Unweighted		
	2023	2022	2021	2023	2022	2021
Portfolio Manager	22%	25%	25%	22%	25%	22%
Analyst	66%	61%	59%	67%	62%	63%
Both	6%	8%	12%	6%	7%	10%
Senior Management/Other	4%	5%	3%	4%	6%	5%
Economist/Strategist	1%	-	1%	1%	-	1%

Asset Size	Weighted			Unweighted		
	2023	2022	2021	2023	2022	2021
>=$5B	58%	52%	57%	23%	13%	14%
$1B - $4.99B	27%	24%	21%	27%	16%	15%
$.5B - $.99B	6%	8%	8%	10%	7%	8%
$.3B - $.49B	3%	4%	5%	10%	8%	9%
<$.3B	6%	12%	10%	30%	57%	53%

Institution Type	Weighted			Unweighted		
	2023	2022	2021	2023	2022	2021
Hedge Funds	9%	8%	7%	29%	25%	20%
Other Accounts	91%	92%	93%	71%	75%	80%

Voter Universe: Assets Under Management

2023 All-China Research Team Report: Firm-Based Results – International

Response Rates	2023	2022	2021
Number of Firms	309	597	593
Number of Individuals	951	1,294	1,304
Number of Votes	15,567	16,899	17,690

	Weighted			Unweighted		
Voter Region	2023	2022	2021	2023	2022	2021
Hong Kong	64%	62%	64%	65%	63%	63%
Singapore	13%	10%	10%	15%	11%	11%
Rest of Asia (ex-China, Hong Kong and Singapore)	7%	8%	9%	9%	11%	10%
U.S./Canada	14%	15%	14%	7%	10%	11%
Europe	3%	4%	3%	4%	5%	5%

	Weighted			Unweighted		
Voter Function	2023	2022	2021	2023	2022	2021
Portfolio Manager	25%	21%	19%	24%	23%	21%
Analyst	49%	49%	45%	57%	56%	51%
Both	17%	21%	27%	10%	12%	17%
Senior Management/Other	6%	7%	7%	6%	7%	8%
Economist/Strategist	3%	2%	3%	3%	2%	3%

	Weighted			Unweighted		
Asset Size	2023	2022	2021	2023	2022	2021
>=$5B	40%	28%	29%	16%	8%	8%
$1B - $4.99B	35%	29%	33%	19%	10%	13%
$.5B - $.99B	7%	9%	8%	10%	6%	5%
$.3B - $.49B	7%	9%	9%	11%	7%	9%
<$.3B	12%	26%	22%	44%	69%	65%

	Weighted			Unweighted		
Institution Type	2023	2022	2021	2023	2022	2021
Hedge Funds	13%	16%	15%	43%	34%	31%
Other Accounts	87%	84%	85%	57%	66%	69%

Voter Universe: Assets Under Management

2023 All-China Research Team Report: Analyst-Based Results – International

Response Rates	2023	2022	2021
Number of Firms	309	581	566
Number of Individuals	936	1,260	1,246
Number of Votes	29,053	28,155	28,323

	Weighted			Unweighted		
Voter Region	2023	2022	2021	2023	2022	2021
Hong Kong	65%	64%	66%	65%	64%	64%
Singapore	13%	12%	11%	15%	11%	11%
Rest of Asia (ex-China, Hong Kong and Singapore)	7%	9%	9%	9%	11%	9%
U.S./Canada	12%	12%	12%	7%	10%	11%
Europe	2%	3%	2%	4%	4%	5%

	Weighted			Unweighted		
Voter Function	2023	2022	2021	2023	2022	2021
Portfolio Manager	26%	22%	18%	24%	23%	21%
Analyst	50%	52%	47%	57%	56%	52%
Both	16%	19%	25%	10%	12%	17%
Senior Management/Other	4%	6%	6%	6%	7%	7%
Economist/Strategist	3%	2%	3%	3%	2%	2%

	Weighted			Unweighted		
Asset Size	2023	2022	2021	2023	2022	2021
>=$5B	40%	28%	29%	16%	8%	8%
$1B - $4.99B	35%	29%	32%	19%	10%	13%
$.5B - $.99B	7%	9%	8%	10%	6%	6%
$.3B - $.49B	7%	9%	10%	11%	7%	9%
<$.3B	11%	24%	21%	44%	68%	64%

	Weighted			Unweighted		
Institution Type	2023	2022	2021	2023	2022	2021
Hedge Funds	13%	17%	15%	43%	34%	32%
Other Accounts	87%	83%	85%	57%	66%	68%

Published Results

RESEARCH

OVERALL

Best China Research
- AUM Weighted Firm Leaders' Table
- AUM Weighted Analyst Leaders' Table

BY SECTOR

- Top 3 & Runner Up firms by sector
- Top 3 & Runner Up analysts by sector
- ***Rising Stars – Top local firms by sector (NEW)**

INDUSTRIES

Agriculture	Real Estate
Autos & Auto Parts	Small & Midcap Stocks
Banks	Technology Hardware
Building Materials	Technology IT Services & Software
Chemicals	Telecommunications
Consumer Discretionary	Transport, Aerospace & Logistics
Consumer Staples	
Gaming, Lodging & Leisure	
Healthcare, Pharmaceuticals & Biotechnology	
Industrial	
Internet and Media	
Metals & Mining	
Non-bank Finance	
Oil & Gas	
Public Utilities & Alternative Energy	

MACRO

Economics
ESG Research
Quantitative Research
Strategy
Thematic Research

CORPORATE ACCESS

Top 10 China Corporate Access Providers
- Weighted by AuM

SALES

Top 10 China Sales Team
- Best Firms Weighted by AuM

Corporate Access

China Corporate Access	China Sales
Buy-Side View	**China Generalist Sales**
Attributes	**Attributes**
Field Trips Team Quality Logistics Conferences Roadshows Virtual Events	Understanding Client Needs Adding Value to Research Idea Generation Service & Responsiveness Global Context Market Knowledge & Feel
Methodology	**Methodology**
• Select the Attribute • Search for the firm • Rate from 5 (excellent) to 1 (average). • Vote for up to 7 firms for each attribute: 2 x 5, 2 x 4, 1 x 3, 1 x 2, 1 x 1 • Add comments for additional color.	• Select the Attribute. *(e.g. idea generation)* • Search for the firm • Rate from 5 (excellent) to 1 (average) across the attributes • Vote for up to 7 firms for each attribute: 2 x 5, 2 x 4, 1 x 3, 1 x 2, 1 x 1 • Add comments for additional color

Analyst Limits & Write Ins

RULES

Rule 1: Five (5) industry sectors maximum, per analyst overall.[1]

Rule 2: Maximum of 15 analysts per firm, per *industry* sector on the roster.

Rule 3: Maximum of 20 analysts per firm, per *macro* sector on the roster.

EXCEPTIONS

MACRO

Thematic: 5 analysts per firm

WRITE-INS

Rule 1: For any sectors where the full quota of analysts has been filled for the roster, write-in analyst votes will not be accepted where it causes roster limits to be breached.

Rule 2: All analyst write-in votes that take a firm over the assigned quota will be discarded. The firm vote or entire ballot may also be discarded.

Notes:

1) Any analysts over the limits will have sectors removed by II on the eve of the survey, in ascending order of votes received in 2022, starting from lowest.

Voting Guide

Registration
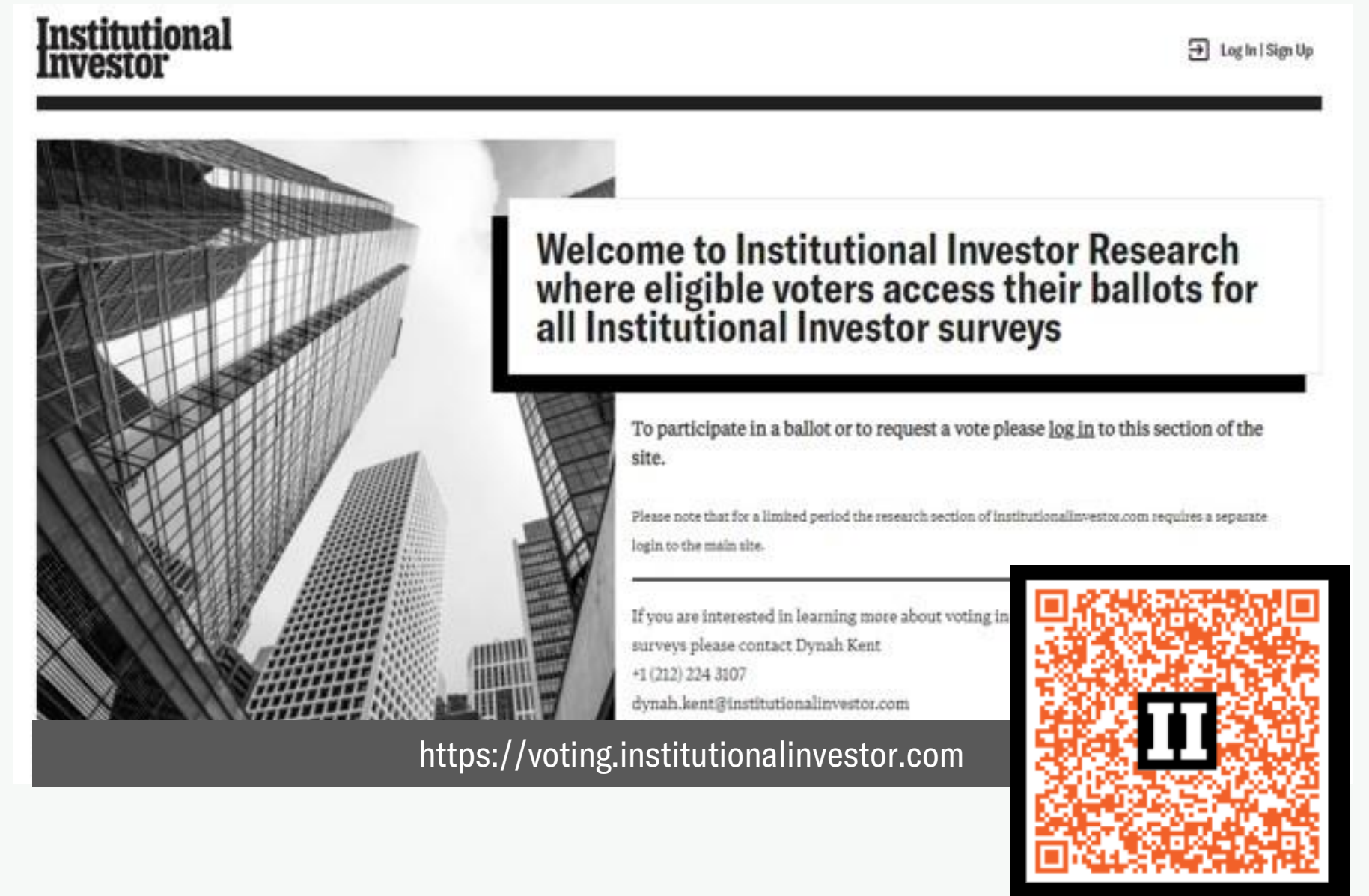
RANKINGS

1. First-time users click <Sign up> in top right corner.

2. Validate through a professional email address.

3. Existing voters (registered with IIR), start voting.

4. New users click 'Request a vote' and complete profile questions.[1]

5. New users (or unrecognised users) will need to be validated. <u>Not all voters will be accepted.</u>[2]

1. After requesting ballot, validation may take up to 72 hours
2. Individuals that have changed email addresses (firms) will require re-validation

(Detailed step-by-step guide available in the following Voting Guide)

https://voting.institutionalinvestor.com

Overall Structure

FIRM VOTE

NOT LINKED

INDIVIDUAL VOTE

7 Firms

5 Analysts

(1) Firm and analyst votes are NOT linked. They should correlate naturally.
(2) A voter can vote for a firm and <u>not</u> an analyst, but cannot vote for an analyst and <u>not</u> a firm.
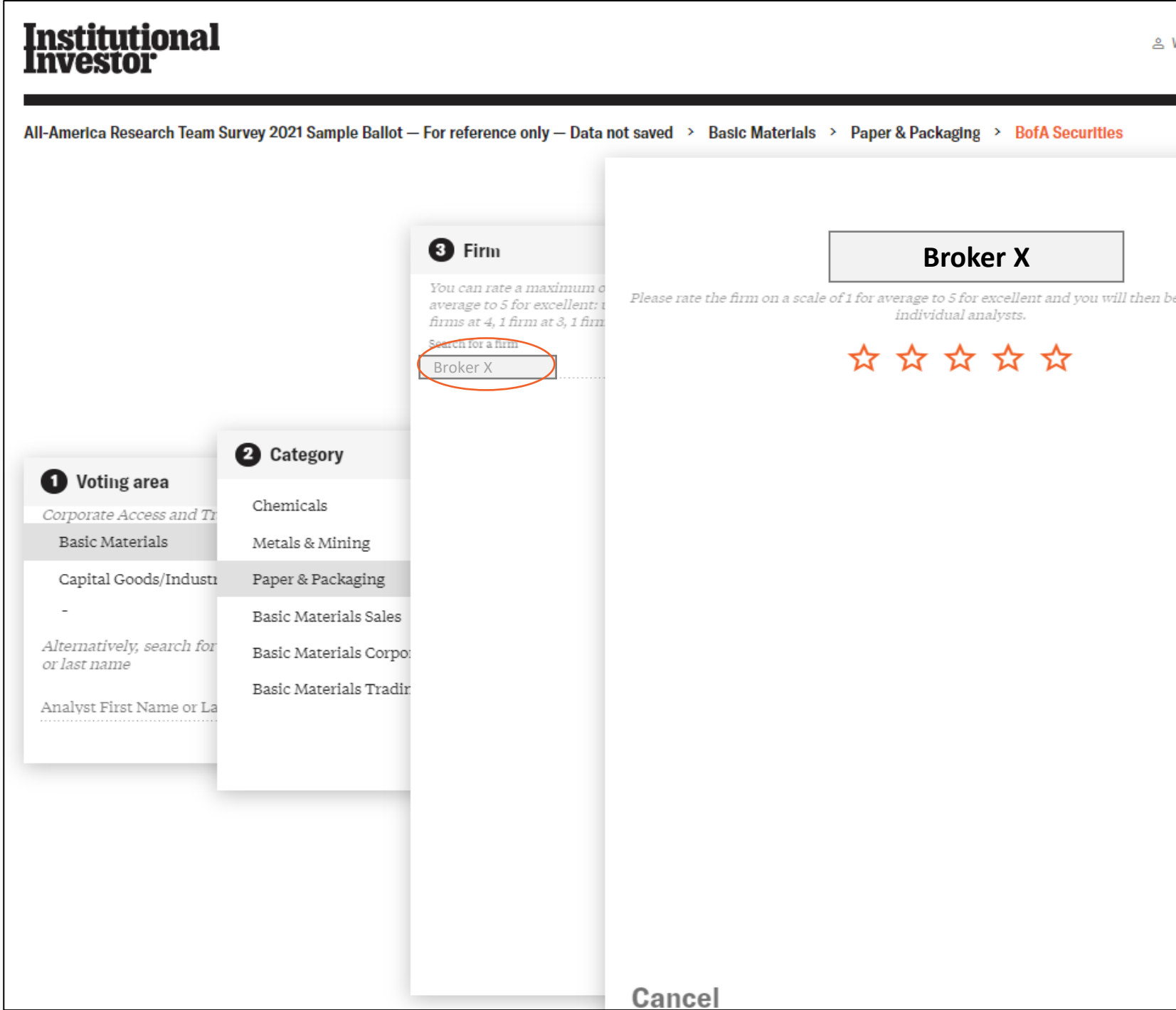
Voting (China)

5 Choose a voting area:

For **Sales** and **Corporate Access**, select categories.

For **Sales** and **Corporate Access**, select the attribute.

Voting (China)

6 For Research, search for and select the firm*:

7 Rate the firm from 5 (excellent) to 1 (average). For Research, the analysts for that firm will appear.
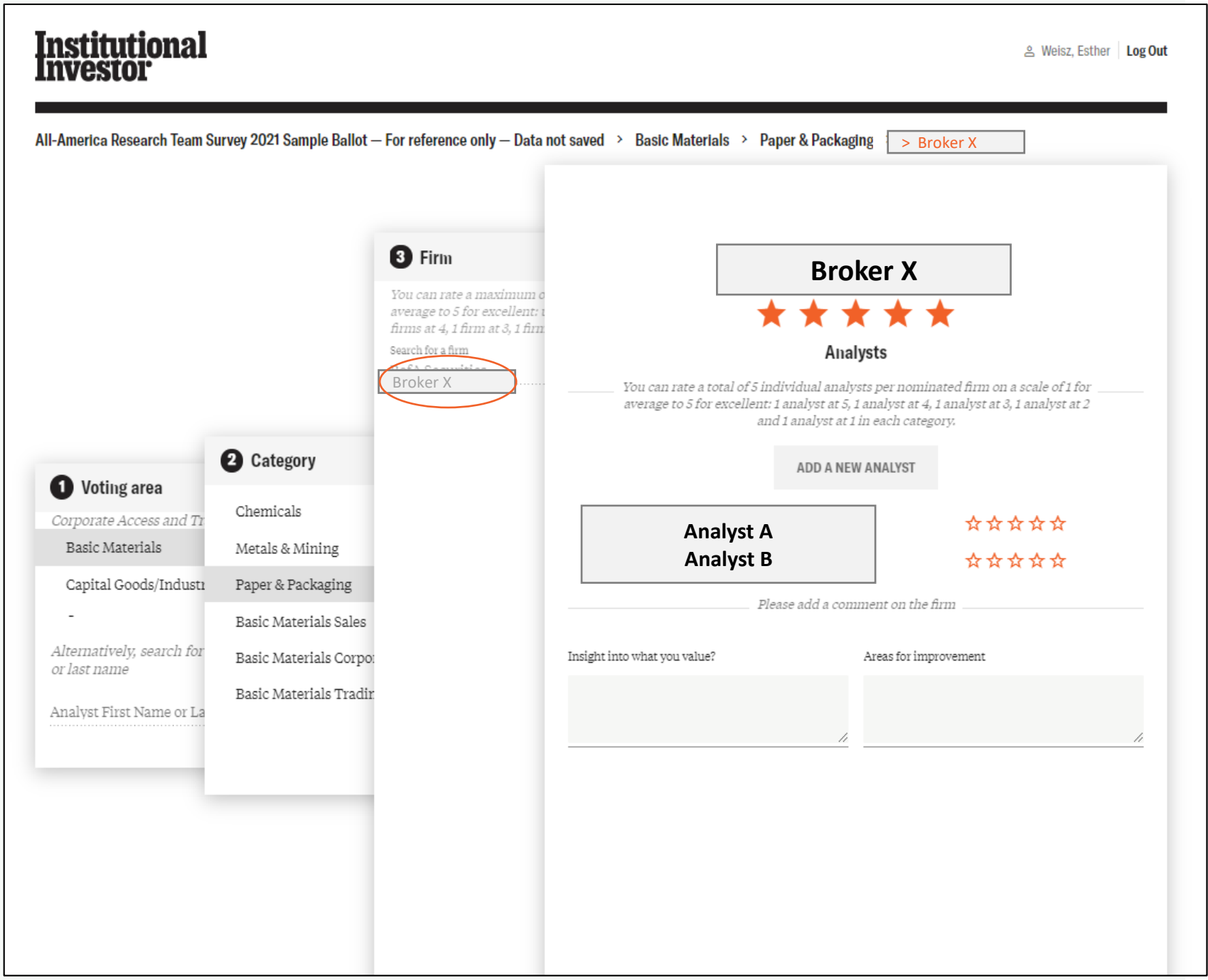
Firm names are preloaded and will appear on a drop-down list as you type.

Comments & Review

Comments

Voters can provide commentary for each firm.

Review

Voters can move back one level to rate additional firms in each category. The list of firms already rated will be shown.

Change

Voters can switch between categories and voting areas to add or change ratings. They can return to the platform at any time during polling. Any votes entered at the end of polling will be considered final.

Contact
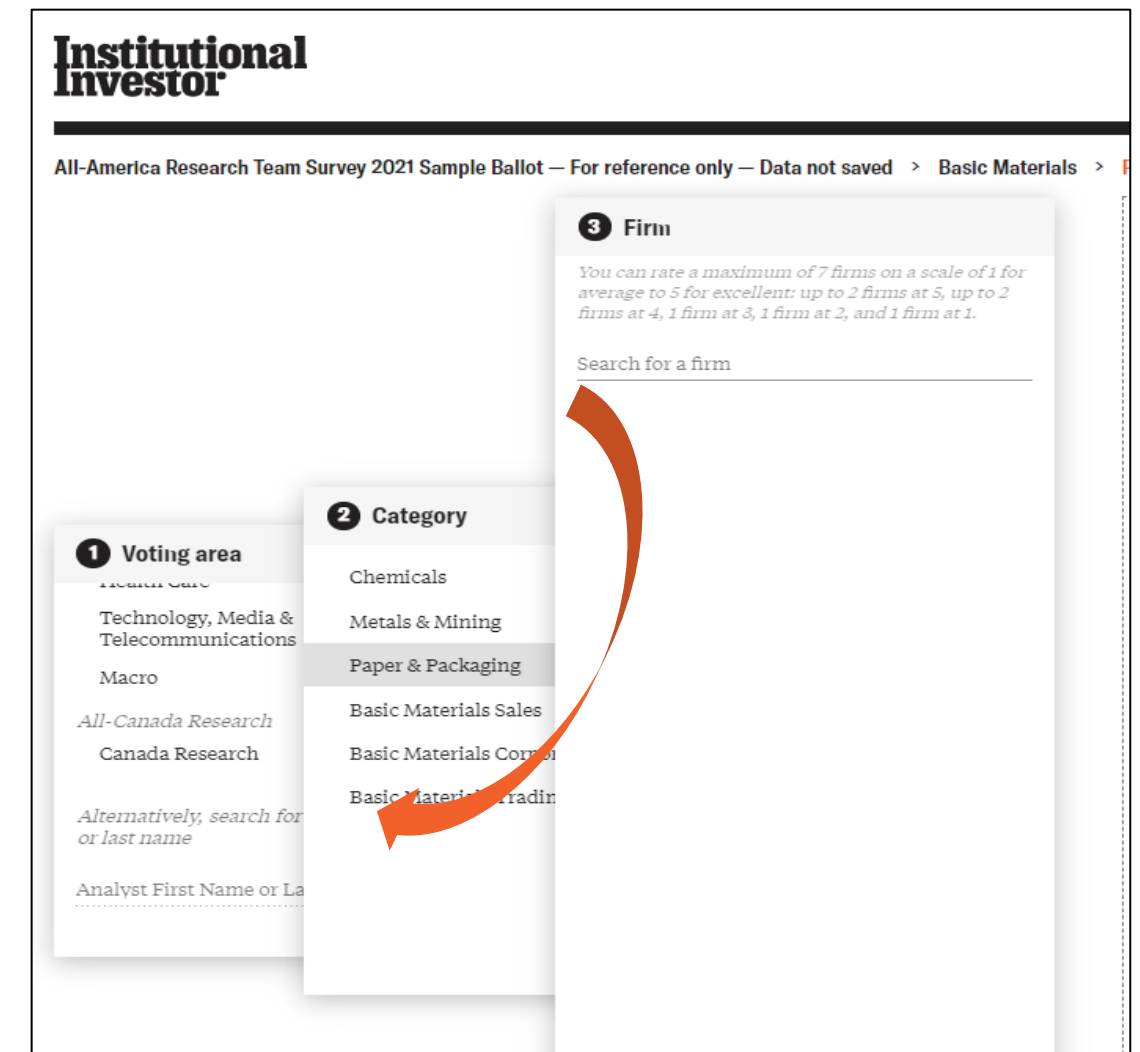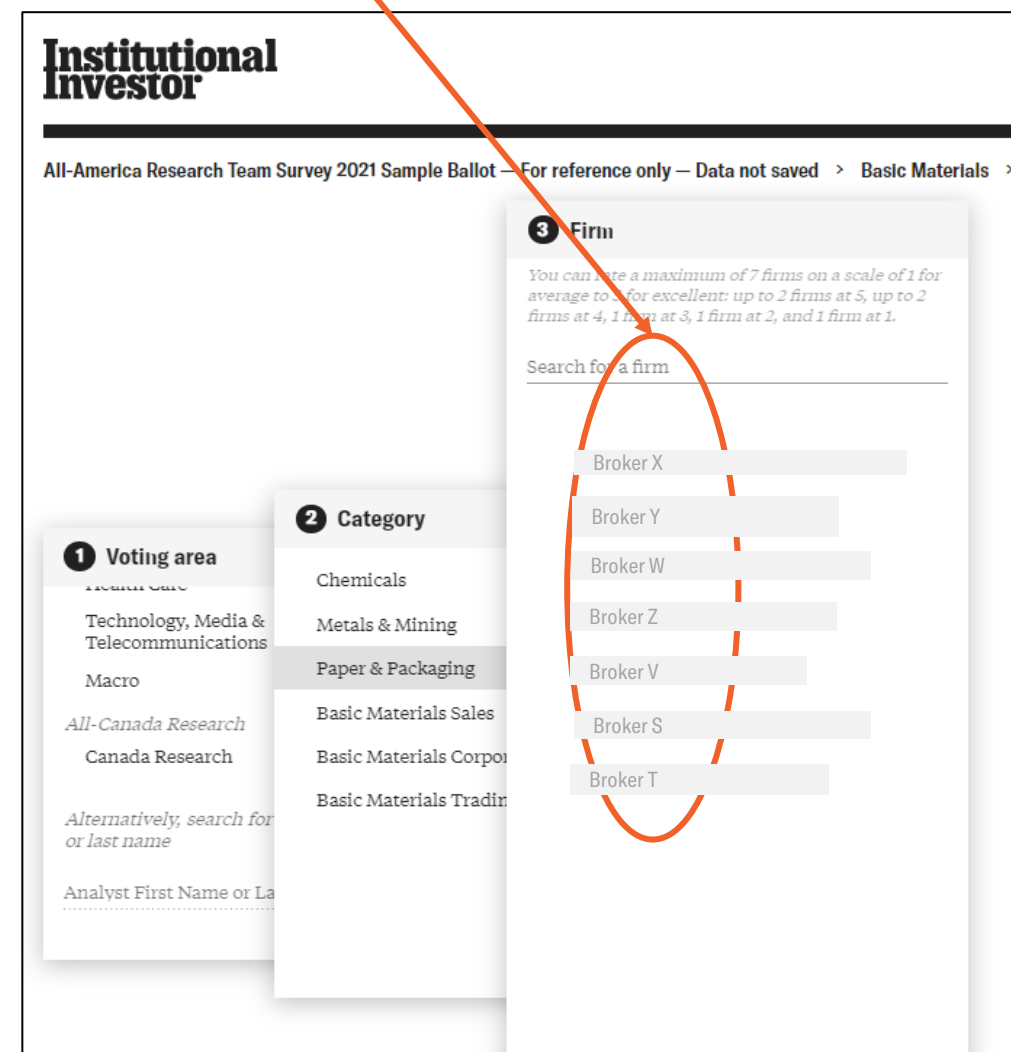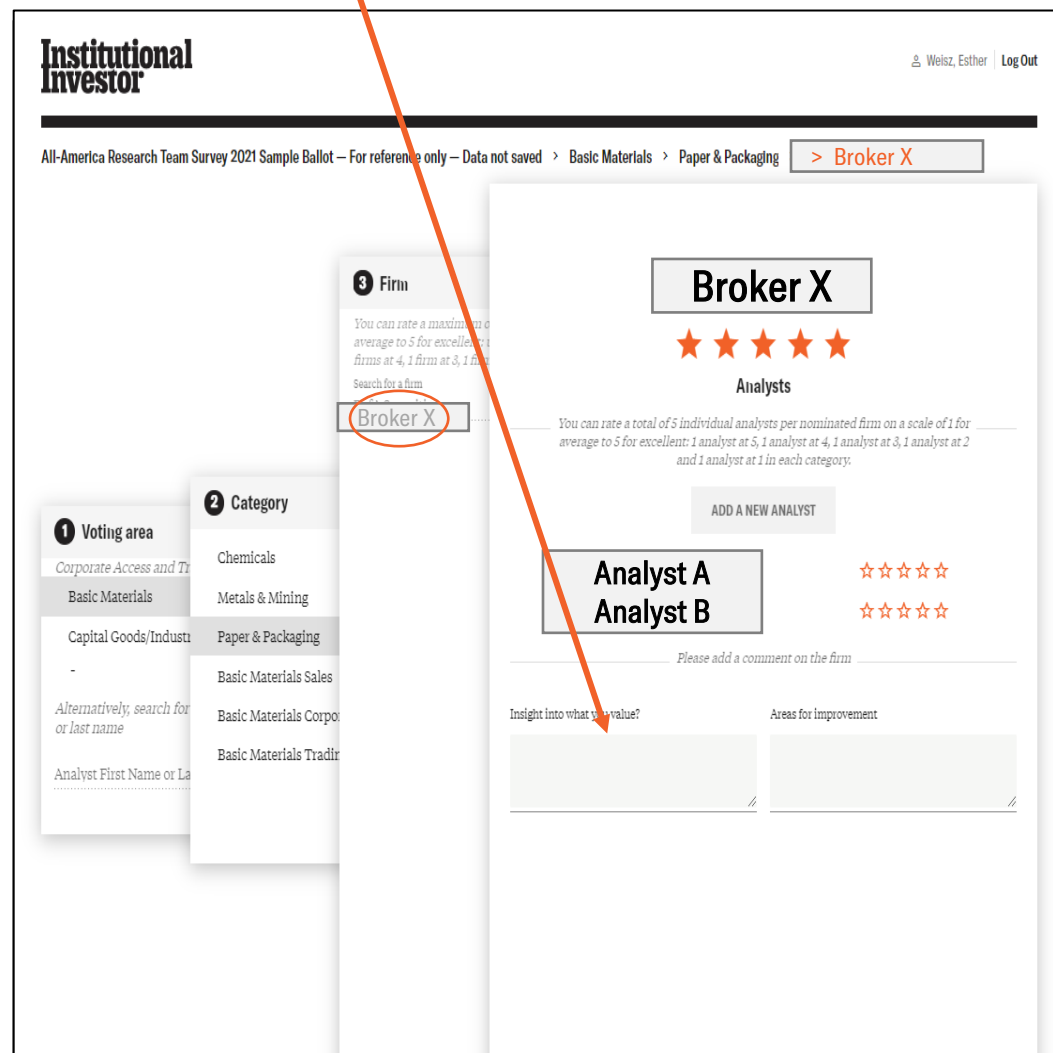
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