



Extel Insights Dashboard

Quick Start User Guide -
Buy Side Users



Buy Side Users

The Extel Insights Buy Side Research Dashboard is designed to explore and analyse survey data, providing actionable insights for company strategy and competitive positioning



Opening the Dashboard

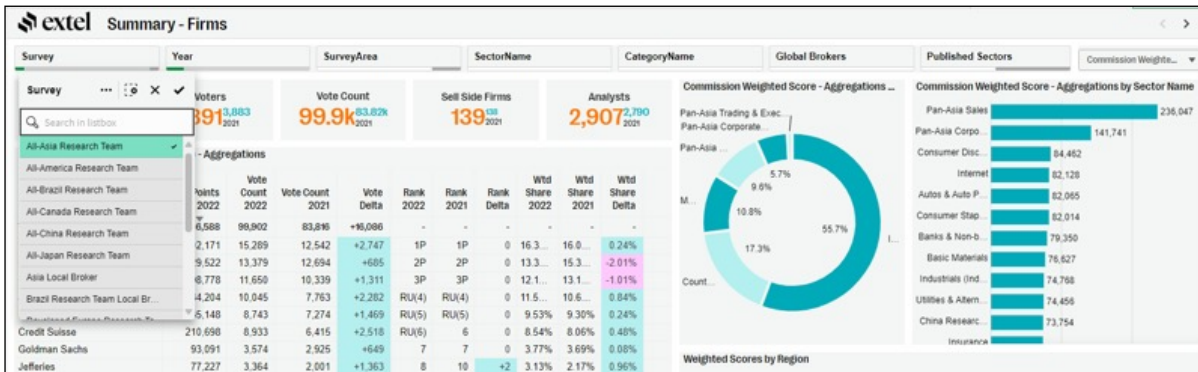
- Click the Buy Side Insights icon to begin.
- Select your required dashboard sheet.

The screenshot displays the Qlik Analytics Services Catalog interface. At the top left, the Qlik logo and 'Analytics Services' are visible. A search bar on the top right contains the text 'Search for content'. On the left side, a navigation menu includes 'Home', 'Favorites', 'Catalog' (which is highlighted), 'Collections', and 'Getting started'. The main 'Catalog' area features a search input field with 'Buy' entered, and filter buttons for 'Spaces' (set to 'UAT - Extel Stag...'), 'Types', and 'Owner'. Below the filters, a 'UAT - Extel Staging' filter is active, with a 'Clear all' button. Two dashboard cards are displayed: 'extel Buy Side Insights Equities' and 'extel Buy Side Insights Fixed Income'. Both cards show 'LIVE - Buy Side Equities v11.2' and 'LIVE - Buy Side FICC v11.2' respectively, with a 'Updated 8 hours ago' timestamp and a share icon.



Full Survey Results & Rankings - Firm & Analysts

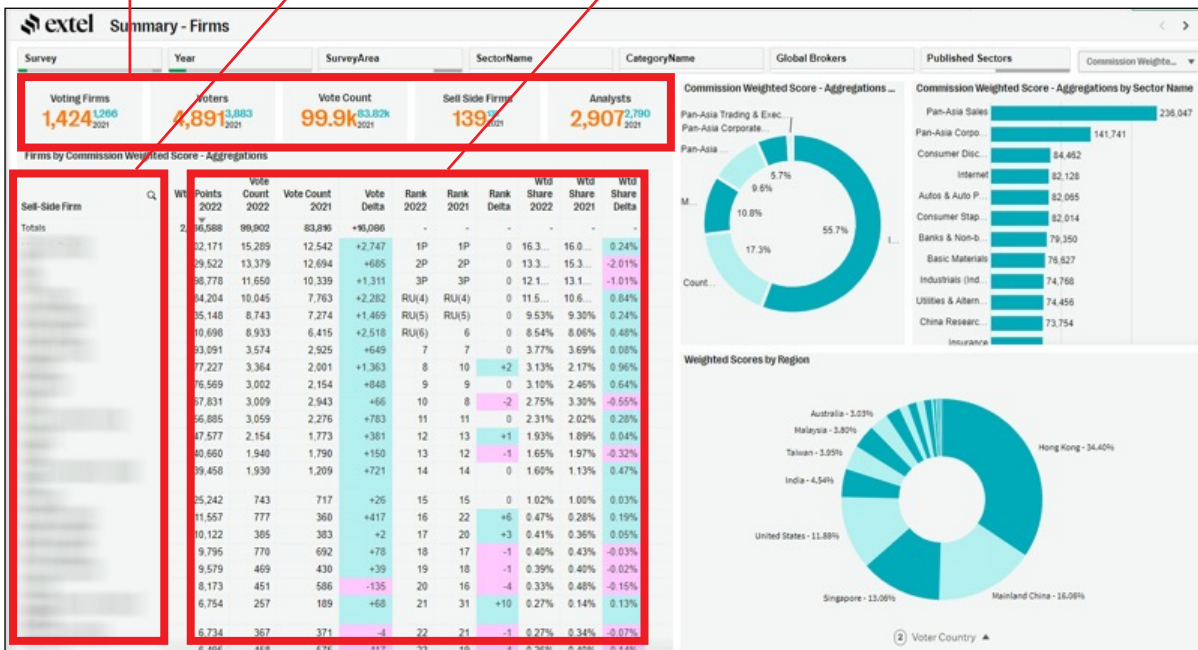
- The selected dashboard provides full and detailed results and rankings (not just top level "published" ranks).
- The first two dashboard sheets provide Firm level results and the second sheet the Analyst level.
- Results are initially displayed at the Aggregated level.
- Use filters to view Sector-by-Sector level.
- Apply filters with the selection boxes at the top of the screen or by clicking directly into the charts.



Survey Universe

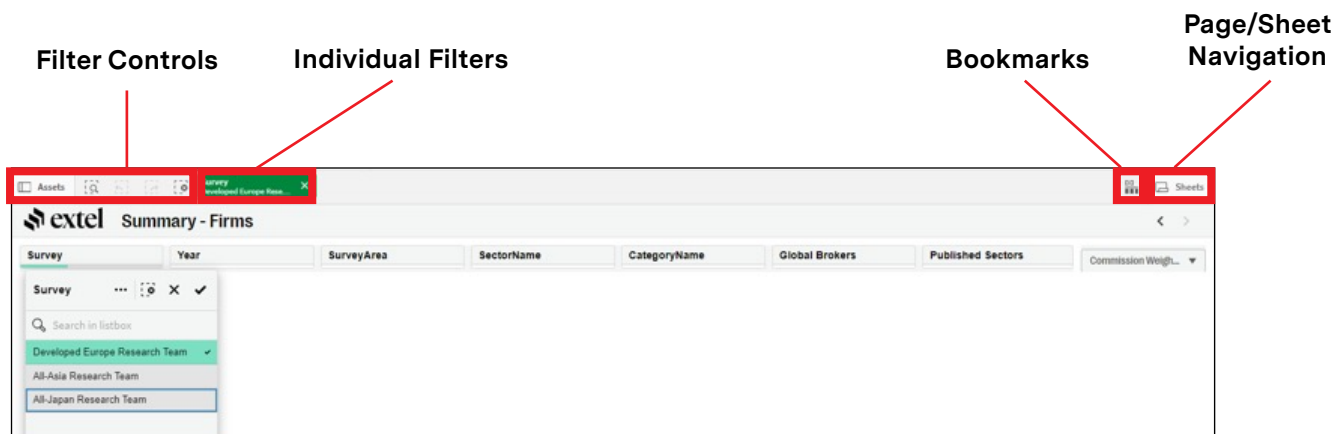
Top Ranked Firms/
Analysts

Weighted points, share of vote and
deltas vs previous year



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 top left.
- Page/Sheet navigation controls are top right.
- Once filters are selected in one tab, they are applied in other tabs.



Voter Profile & Peer Group Survey Participation

- Here the Voter profile and participation levels across various Buy Side demographics are shown.
- Select demographics (eg by Region, Commission Band etc) using the options on left hand side of the sheet.
- The voter profile by each Band/Region/Type demographic is shown in the bar chart.
- Your firm's grouping is highlighted in yellow.
- The distribution charts show participation levels in the survey across the various peer groups, for example, no. of firms voted for or no. of sectors voted in, alongside the participation level for your own firm.

Select Buy-Side Voter demographic

Voter Profile

Peer group participation vs. your specific firm participation

Buy Side: Vote Profile - segments highlighted

Survey: Survey Type: Year: Sector Drill Down: SectorName: PublishedSector: CommissionBand: Commission Weighted Score

Total Voting Firms: 1,749
Total Number of Voters: 4,875

Voter Profile by...

- Voter Company Type
- Voter Country
- Voter Region
- Voter Custom Region
- Voter Company HQ
- ALUM Band
- Coordinated Vote Type

Voter Profile (Weighted Points) by CommissionBand

Commission Band	Percentage
Band 1	27%
Band 2	11%
Band 3	14%
Band 4	18%
Band 5	12%
Band 6	8%
Band 7	4%
Band 8	4%
Band 9	2%

Distribution of Number of Voters per Buy Side

Band	Min	Average	Max	Your Firm
Band 1	1	20.5	82	
Band 2	1	11.9	49	1
Band 3	1	11.2	35	
Band 4	1	6.8	28	
Band 5	1	5.6	25	
Band 6	1	3.1	27	
Band 7	1	2.4	18	
Band 8	1	1.8	10	
Band 9	1	1.4	10	

Buy Side Vote Distributions

Band	FIRMS Voted For (Min, Average, Max)	Your Firm	ANALYSTS Voted For (Min, Average, Max)	SECTORS Voted For (Min, Average, Max)	Your Firm
Band 1	7, 30.6, 53			11, 408.1, 1312	60
Band 2	2, 22.2, 41	27		5, 244.3, 740	361
Band 3	5, 21.8, 41			7, 222.1, 871	56
Band 4	1, 15.7, 35			1, 131.3, 460	53
Band 5	1, 15.7, 61			2, 109.9, 440	51
Band 6	1, 9.9, 38			1, 54.8, 256	46
Band 7	1, 7.1, 23			1, 31.0, 250	43
Band 8	1, 5.1, 25			1, 26.0, 370	50
Band 9	1, 3.4, 24			1, 13.1, 245	47

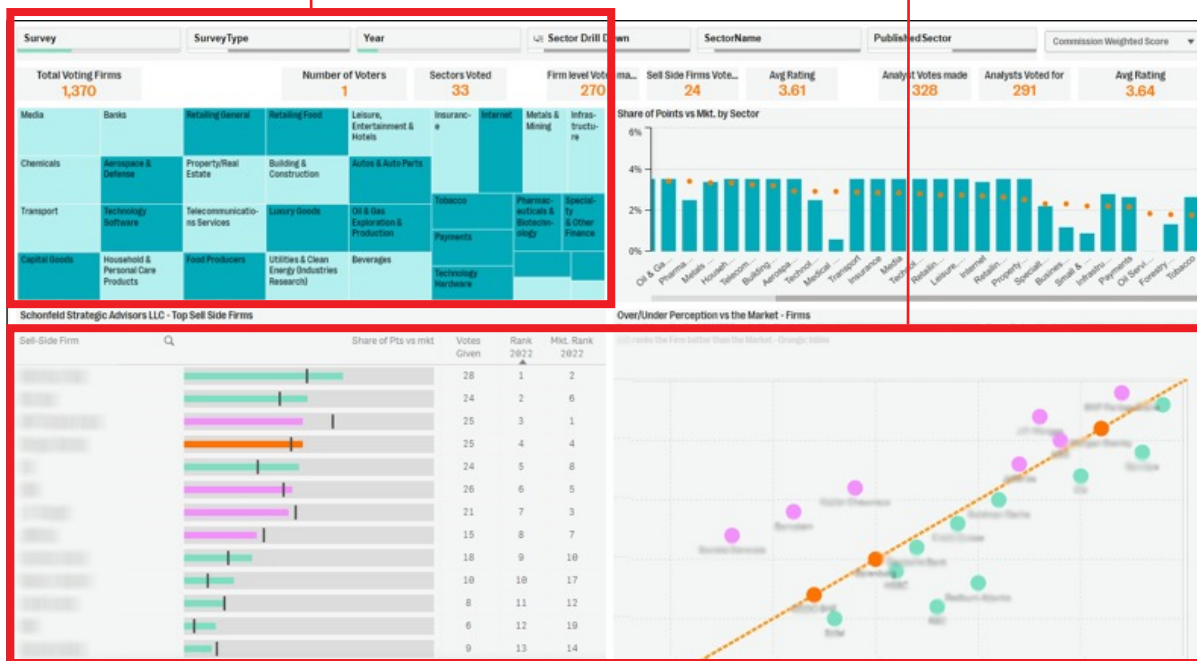


Broker Evaluation Analysis

- This powerful sheet gives a detailed comparison, by Sector, of your Research Provider evaluations vs the consensus market perception provided by the overall results.
- The left hand table of results can be sorted by your 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.
- The right hand scatter chart provides a useful visualization of the same data.
- Sector level Analyst ranking comparisons are further down the sheet (NB requires a single Sector to be selected).

Voter Profile

Compare your evaluation of Research Providers vs the market perception



extel

An Institutional Investor company

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