Extel Insights Dashboard

User Guide - Executive Team

QUICK START USER GUIDE

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Introduction

The Extel Executive Team Dashboard is designed to provide independent, objective, and unsolicited perception data from institutional investors on your company. This guide is intended for Investor Relations professionals, CEOs, and CFOs of listed corporates.

Dashboard Overview

The Dashboard consists of several key sheets, each providing specific insights:

1. My Results
2. Participation
3. Strengths and Weaknesses
4. Performance

Navigation and User Interface

i.   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
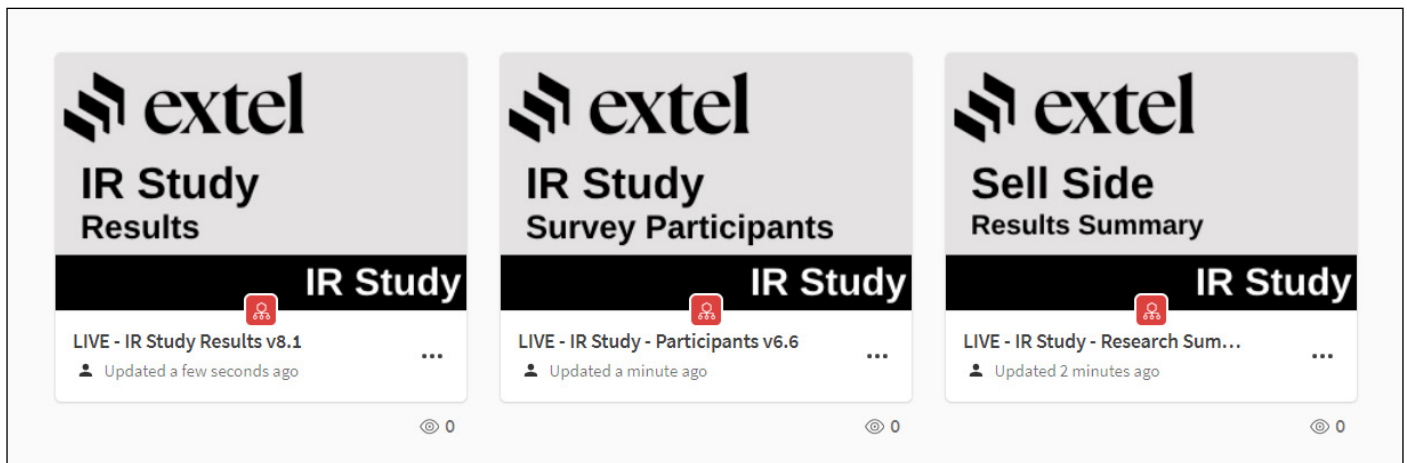
ii.   Navigation

- Top Navigation Bar: Allows direct navigation to specific sheets
- Information Buttons: Provide explanations for graph data
- Home Button: Returns user to the My Results page
- Plus/Expand "+" Buttons: to open or collapse more detailed breakdowns
- Hover-overs: provide additional information on data points, descriptions and invitations to interact and find out more detail
- Page/Sheet navigation controls are at Top right.
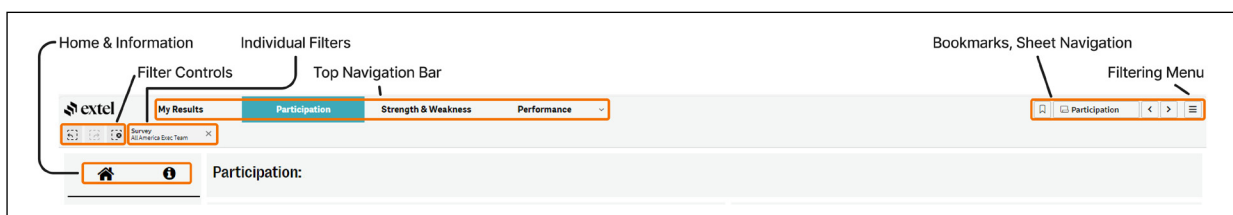
iii. Filtering
- Filtering Options: Located in the ellipsis menu in the top-right corner. Allows for granular data viewing. Options include:
  i. Survey: switching between purchased surveys
  ii. Year: switch between the years of data
  iii. Company Name: switch the perspective of the data and choose another Company within your purchased survey(s)
  iv. Buy/Sell Side: change the source of the data for Buy- or Sell-Side voters, or leave unselected for an overall view
  v. Company HQ Location: filter the data by Country of headquarters
  vi. Market Cap: filter the data for companies of a particular size
  vii. Sector: filter the data for companies of a particular sector
  viii. Category: filter the data for companies of a particular subsector
  ix. Ranking Type: to filter the data by "Best…" ranking type
  x. Attribute Grouping: filter the data by specific attribute-driven groupings
- Selections:
  i. Green – selected item(s)
  ii. White – available options
  iii. Grey – not available based on other selection
 iv. Filter controls (back/fwd/clear all) plus modifiying, clearing individual selections are at Top Left.
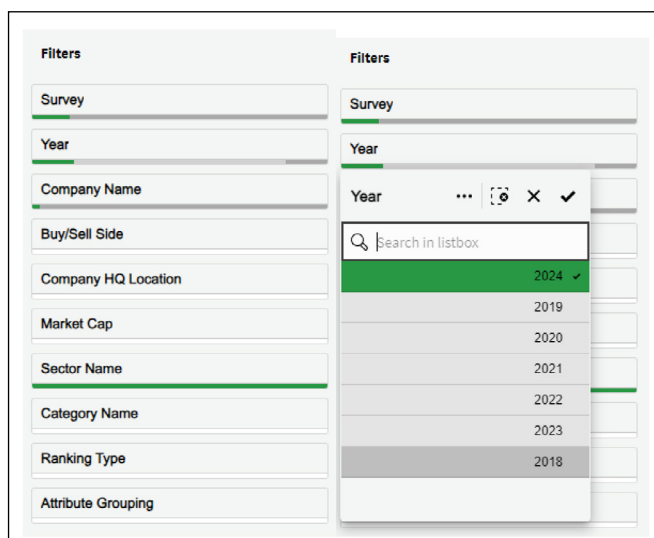
Applied filters appear at the top of the Dashboard for easy reference and removal. Once filters are in place in one tab they carry over and apply in other tabs. Basic navigation, filters work the same in all Dashboards.

iv. Voter Profile Selector
   Allows users to change the view of the vote distribution in sheets throughout the Dashboard by:
   - Geography (by Country and Region)
   - Ranking Type
   - Research Rank
   - AUM
   - Voter Function
   - Voter Company Type

Vote Profile Selector

Voter Country ▼
Voter Region
Voter Country
Ranking Type
Market Cap
Research Rank
AUM
Voter Function
Voter Company Type
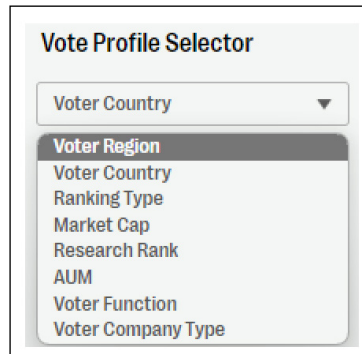
v. Analysis Selector
   Toggle between different preset graphs, charts and tables showing different cuts and views of the data
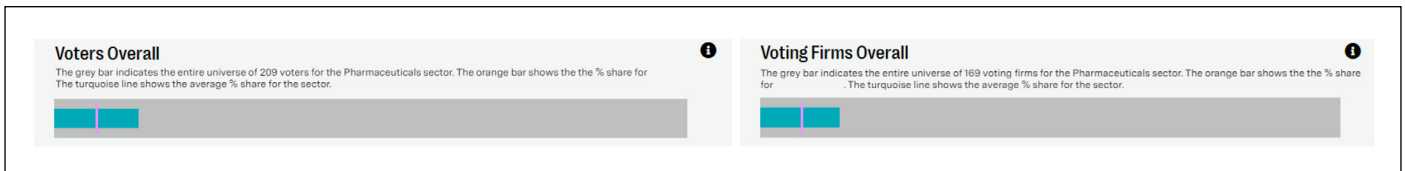
vi. Concise vs Detailed views:
   Options to include or exclude previous year comparisons and/or deltas

vii. Sector, Country, Peer comparisons:
   "Benchmarking" options to compare your performance against different groups

viii. Headline KPIs:
   Each sheet has its own "headline" figures. Specific to the sheet you are looking at, they are designed to cut to the key metrics to measure your performance against


Voters Overall ⓘ
The grey bar indicates the entire universe of 209 voters for the Pharmaceuticals sector. The orange bar shows the the % share for
The turquoise line shows the average % share for the sector.

Voting Firms Overall ⓘ
The grey bar indicates the entire universe of 169 voting firms for the Pharmaceuticals sector. The orange bar shows the the % share for
for   . The turquoise line shows the average % share for the sector.

Detailed Sheet Descriptions

1. My Results

Summarizes key headlines of your results, providing an Overview of Company results, including Rankings, Attributes, Performance, Average Rating and Score. Use this page to quickly assess your company's overall performance across key metrics, including:

- Rankings
- Strongest/Weakest attributes
- Growth/Decline of attributes
- Summary of IR Team's impact (broken down by the individual)
- Performance versus close peers
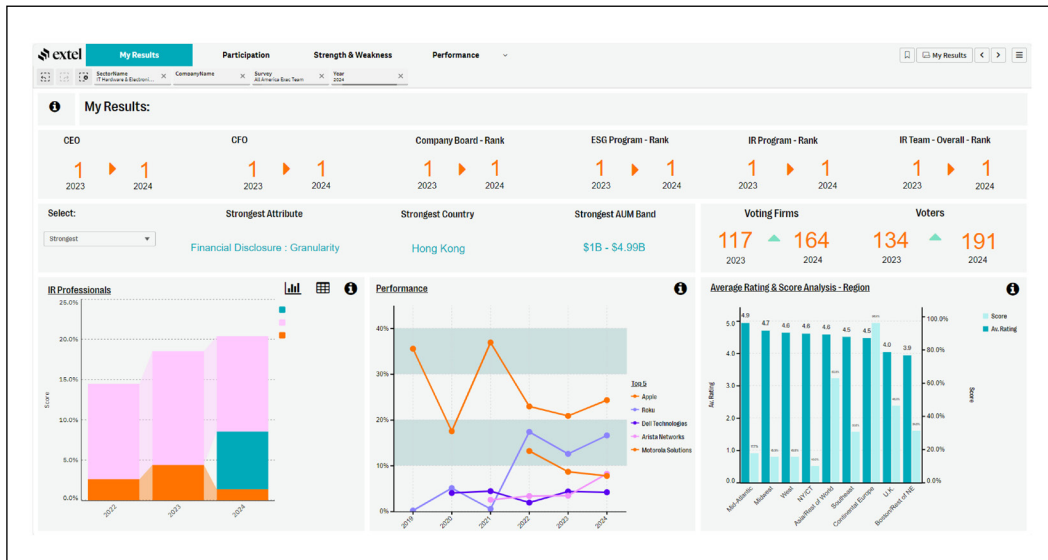
2. Participation

The Participation sheet displays Current and Historical vote volumes, proportions and trends. Understand where your votes have originated from and the profile of investor sharing sentiment on you by using the Voter Profile Selector to see the data from different perspectives, including:

Analysis Types:

- Year-on-Year Comparison: Shows how vote proportions change over time
- Vote Share Analysis: Provides a breakdown of the current year's results
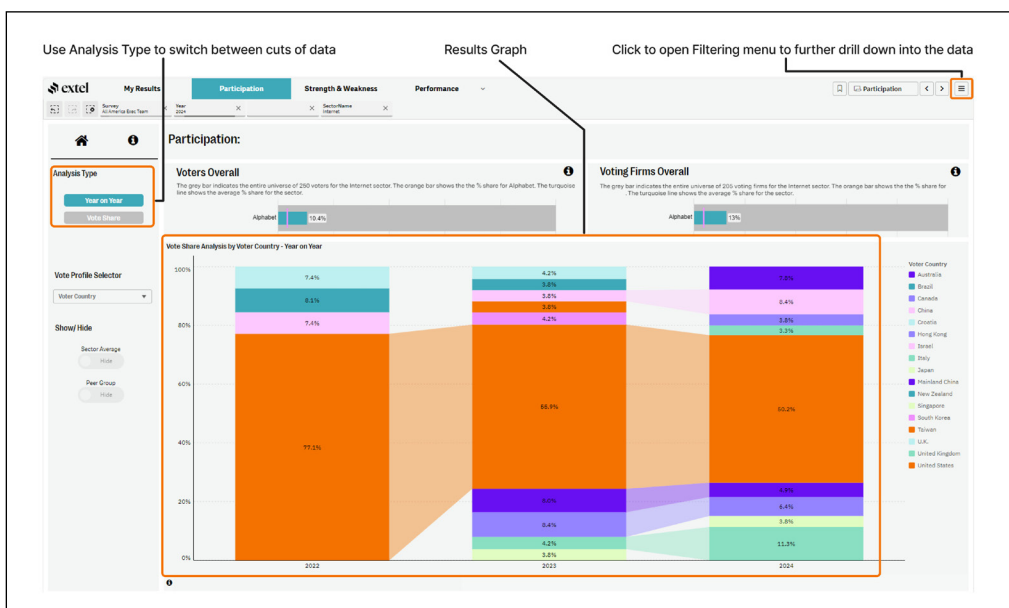
3. Strengths and Weaknesses

Strengths & Weaknesses highlights a company's areas of high-performance and for improvement across various attributes. It includes Ranking & Score Tables for detailed attribute-based results, a Bubble Chart for visualizing relative strengths and weaknesses, and a Heatmap for an intuitive view of high and low performance areas. It includes three analysis types:

Ranking Analysis:
- Brings together Score and Average Rating Analyses for closer comparison against various Voter Profiles
- Displays Top and Second-Ranked Companies
- Hober-over reveals Top 5 performers

Matrix Analysis:
- Graph showing density of Score versus Average Rating. Helps understand Quality vs Quantity of performance against Voter Profiles.

Heatmap Analysis:
- Acts as a heatmap showing strengths and weaknesses across 8 attributes
- Plotted against standard Voter Profile Selector options
- Clicking on intersections reveals Sector leaders in a pop-out window
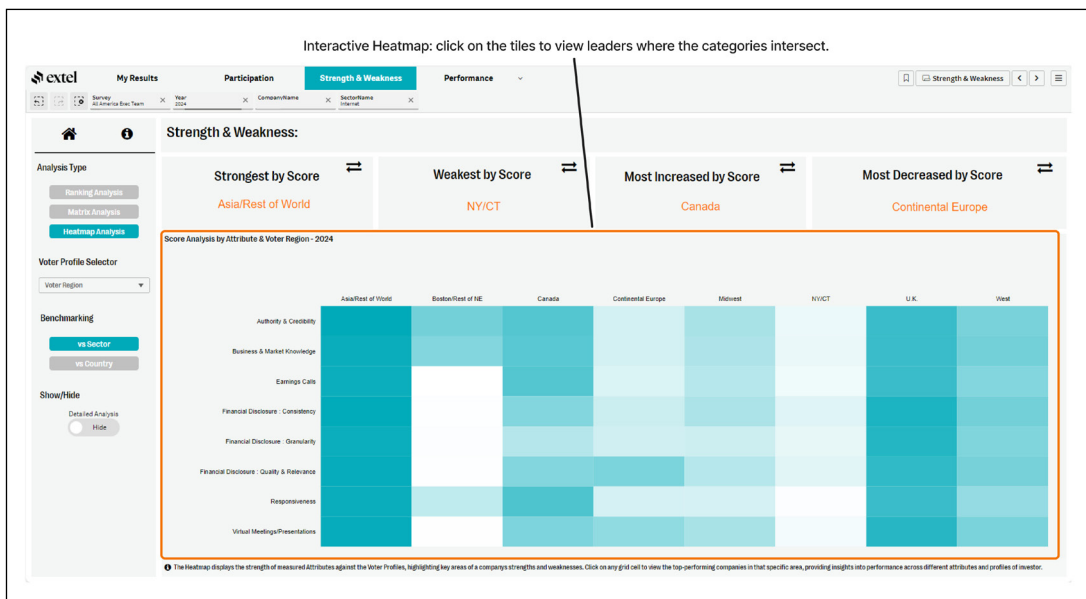
4. Performance

Performance offers a comprehensive view of survey results and company performance. Across the Results Explorer, Performance Analyzer and IR Professionals sheet, gain an insight into a company's performance at a Firm, Individual or Attribute level.

- **Results Explorer:**

  Scores and Ranking Table:
  - Breakdown of all companies by Score and Rank based on selected filters. Quick-filter options on the right for fast data drill-down.
  - Voter Profile options to view data from different voter category perspectives

  Year on Year Analysis:
  - Historical view of Overall Score performance over time
  - Allows comparisons between companies
  - Filtering options available to isolate specific data aspects

- **Performance Analyzer:**

  Ranking Table:

  Company performance breakdown across different Ranking Types:
  - Best IR Program
  - Best Analyst Days
  - Best ESG Program
  - Best IR Team
  - Best Company Board
  - Best CEO
  - Best CFO

  Score – Year on Year:
  - Historical view of performance over time for specific attributes
  - Allows comparisons between companies

  Company View – Year on Year:
  - Plots attributes over time on the same graph for the user's company
  - Helps identify progress and general performance of measured attributes

- **IR Professionals:**

 Individuals Score:
  - Compares Rank and Score of all individual Investor Relations Professionals
  - Based on selected filters

  Team Score:
  - Shows total IR team performance (Rank and Score) against other IR teams
  - "+" icon allows expansion to see individual breakdowns

  Additional features:
  - Toggle between Concise and Detailed views (including previous year comparisons)
  - Option to compare across sector or country
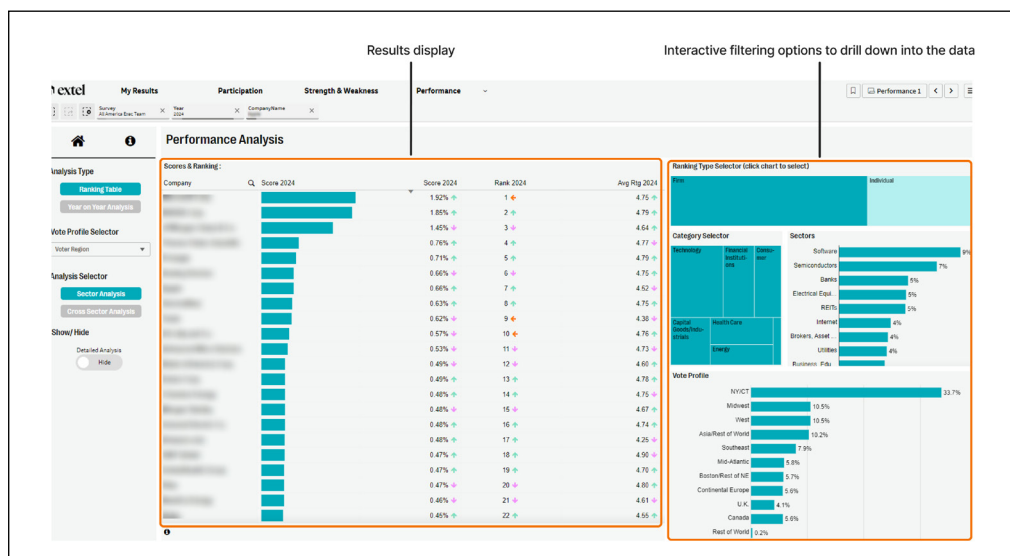
extel

An Institutional Investor company

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