



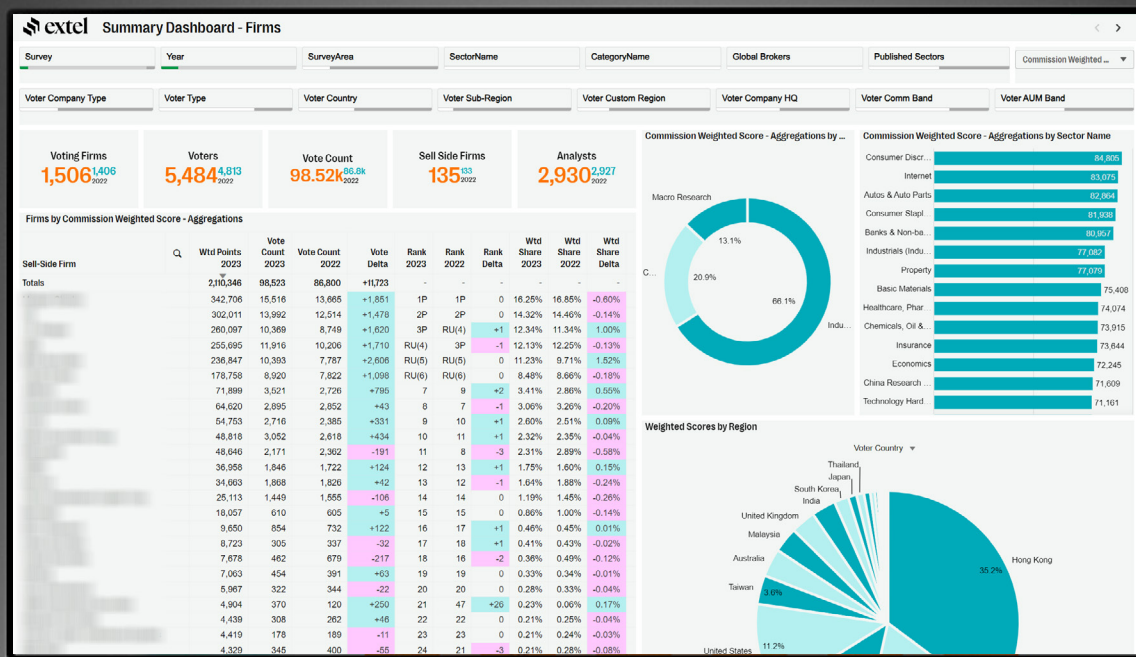
# Extel Insights Dashboard

Quick Start User Guide -  
Sell Side Research Providers

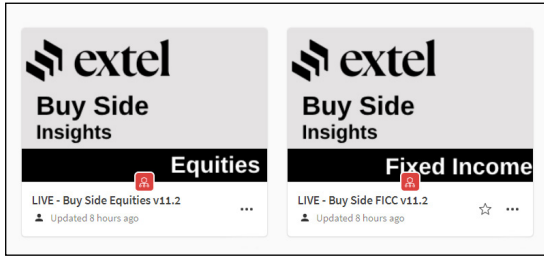


# Sell Side Research Providers

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



## Opening the Dashboards



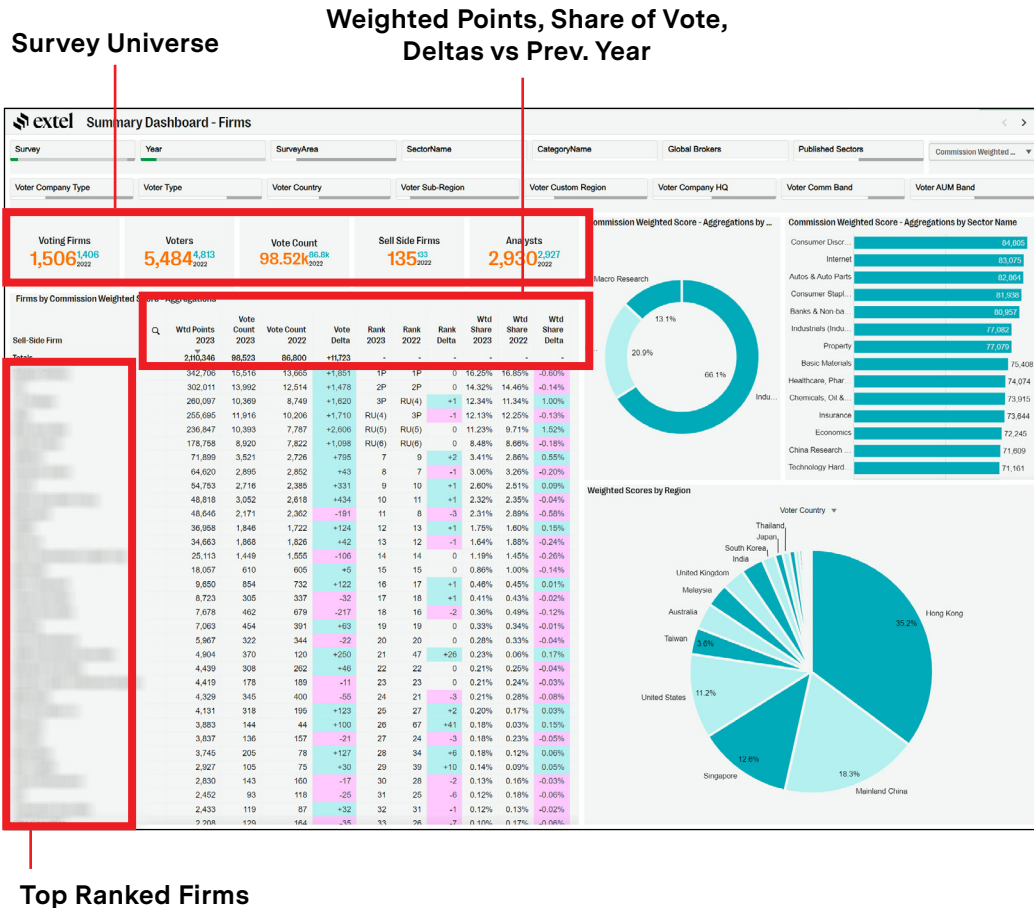
Two core dashboards will be available on the main page. One consists of the Survey Results, the other shows a detailed list of Buy Side Participants who voted in the survey.

**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.

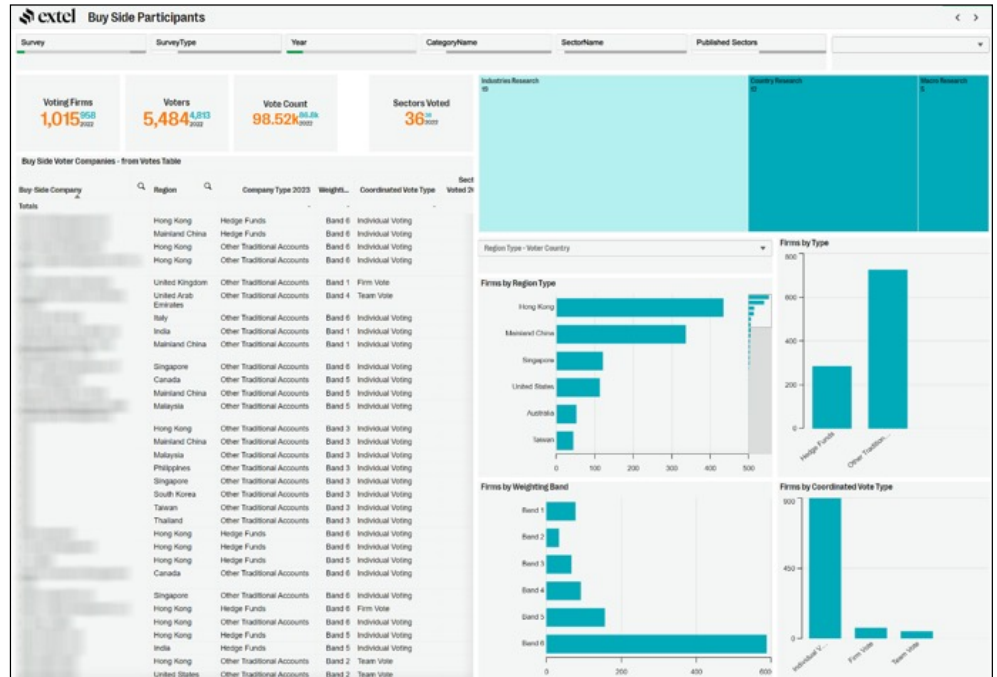
## Summary Dashboard - Firms

- 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.



## 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.

Filter Controls      Individual Filters      Page/Sheet Navigation



## 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).

**Filter: Category**

**Filter: Voter Company Type**

**Updated Top Ranked Firms Based on Modified Criteria**

**Summary Dashboard - Firms**

Survey: [Year] SurveyArea: [SectorName] **Filter: Category**

Voter Company Type: [Voter Company Type] Voter Type: [Voter Type] Voter Country: [Voter Country] Voter Sub-Region: [Voter Sub-Region]

Voting Firms: 1,506 **4,016** Voters: 5,484 **4,813** Vote Count: 98,524 **98,28** Sell Side Firms: 135 **102**

Firms by Commission Weighted Score - Aggregations

Sell Side Firm	Wtd Points 2023	Wtd Points 2022	Vote Count 2023	Vote Count 2022	Vote Delta	Rank 2023	Rank 2022	Rank Delta	Wtd Share 2023
Totals	2,170,348	98,523	98,523	98,800	+1,273	1P	1P	0	16.27%
342,706	15,516	13,665	+1,851	1P	1P	0	14.22%		
302,011	13,992	12,514	+1,478	2P	2P	0	14.23%		
260,097	10,369	8,749	+1,620	3P	RU(4)	-1	12.34%		
255,695	11,916	10,206	+1,710	RU(5)	3P	-1	12.13%		
236,847	10,393	7,787	+2,606	RU(5)	RU(5)	0	11.23%		
178,758	8,520	7,822	+1,098	RU(6)	RU(6)	0	8.48%		
71,899	3,521	2,728	+795	7	9	+2	3.41%		
64,620	2,895	2,892	+3	8	7	-1	3.00%		
54,753	2,716	2,385	+331	9	10	+1	2.69%		
48,818	3,052	2,618	+434	10	11	-1	2.32%		
48,646	2,171	2,362	-191	11	8	-3	2.31%		
36,858	1,846	1,722	+124	12	13	+1	1.75%		
34,663	1,868	1,826	+42	13	12	-1	1.64%		
25,113	1,449	1,555	-106	14	14	0	1.19%		
18,057	610	605	+5	15	15	0	0.86%		
9,850	854	732	+122	16	17	+1	0.46%		
8,723	305	337	-32	17	18	+1	0.41%		
7,678	462	679	-217	18	16	-2	0.36%		
7,063	454	391	+63	19	19	0	0.33%		
5,987	322	344	-22	20	20	0	0.29%		
4,904	370	130	+240	21	47	+26	0.23%		
4,439	308	262	+46	22	22	0	0.21%		
4,419	178	189	-11	23	23	0	0.21%		
4,329	345	400	-55	24	21	-3	0.21%		
4,131	318	195	+123	25	27	+2	0.20%		
3,883	144	44	+100	26	67	+41	0.18%		
3,837	156	157	-1	27	24	-3	0.18%		
3,745	205	78	+127	28	34	+6	0.18%		
2,927	105	75	+30	29	39	+10	0.14%		
2,830	143	160	-17	30	28	-2	0.13%		
2,452	93	118	-25	31	25	-6	0.12%		
2,433	119	87	+32	32	31	-1	0.12%		
1,908	126	162	-36	33	27	-6	0.1%		

Commission Weighted Score - Aggregations by Sector Name

Sector Name	Score
Retailing Broadc.	90,276
Auto & Auto Parts	89,294
Retailing Depart.	79,179
Beverage, Hous.	72,110
Homebuilders &	67,615
Restaurants	65,941
Gaming & Lodging	63,326
Food Producers	59,506
Food Retailers	54,409
Leisure	49,791
Airlines	44,821

Weighted Scores by Region

Voter Sub-Region	Percentage
NYCT	47.0%
West	9.2%
Mid-Atlantic	8.6%
Boston/Rest of NE	7.4%
Midwest	6.4%
Southwest	6.4%
Rest of World	19.0%

**Interactive Drill Down & Filters**

## Summary Dashboard Extended Data (Beta Version)

An alternative view of the Summary Page provides additional data points

**Summary Dashboard (Extended) - Firms**

Survey: [Year] SurveyArea: [SectorName] CategoryName: [CategoryName] Global Brokers: [Global Brokers] Published Sectors: [Published Sectors] Commission Weighted Score: [Commission Weighted Score]

Voter Company Type: [Voter Company Type] Voter Type: [Voter Type] Voter Country: [Voter Country] Voter Sub-Region: [Voter Sub-Region] Voter Custom Region: [Voter Custom Region] Voter Company HQ: [Voter Company HQ] Voter Comm Band: [Voter Comm Band] Voter AUM Band: [Voter AUM Band]

Voting Firms: 1,667 **1,557** Voters: 4,218 **3,786** Vote Count: 111.3K **101.5K** Sell Side Firms: 143 **102** Analysts: 2,844 **2,661**

Firms by Commission Weighted Score - Aggregations

Sell Side Firm	Wtd Points 2023	Wtd Points 2022	Rank 2023	Rank 2022	Rank Delta	Wtd Share 2023	Wtd Share 2022	Vote Count	Vote Delta	Voting Firms	Voting Firms Delta
Totals	4,988,693										
1P											
2P											
3P											
RU(4)											
RU(5)											
RU(6)											
RU(7)											
8											
9											
10											
11											
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25											
26											

Commission Weighted Score - Aggregations by Sector Name

Sector Name	Score
Software - Largecap	96,998
Semiconductors & S.	92,726
Payments, Processin.	82,726
Internet - Largecap	79,726
Clouded Equipment	64,726
Economics	64,474
Banking - Largecap	61,954
Health Care Facilities	61,148
Medical Supplies & D.	60,890
Retailing - Broadc.	60,236
Auto & Auto Parts	60,264
Automotive & Defens.	59,430
Retailing Departmen.	59,179
Automotive & Retail	

Weighted Scores by Region

Voter Sub-Region	Percentage
NYCT	46.1%
West	10.2%
Mid-Atlantic	10.2%
Boston/Rest of NE	7.4%
Midwest	6.4%
Southwest	6.4%
Rest of World	14.0%

- Show/Hide switches allow additional data points to be displayed as required.
- The sheet allows you to configure specific information you wish to display, additional 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).

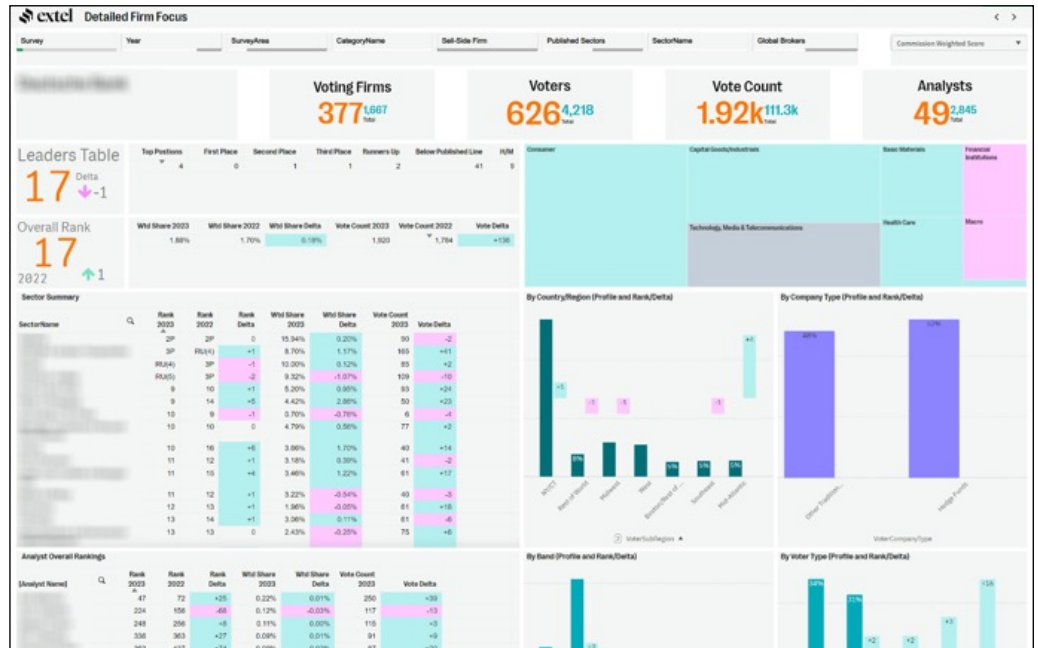


**Show/Hide Switches**

# 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.
- Benchmark: The delta in the weighted score/points to achieve a published position is shown (e.g. how far away from the published position).

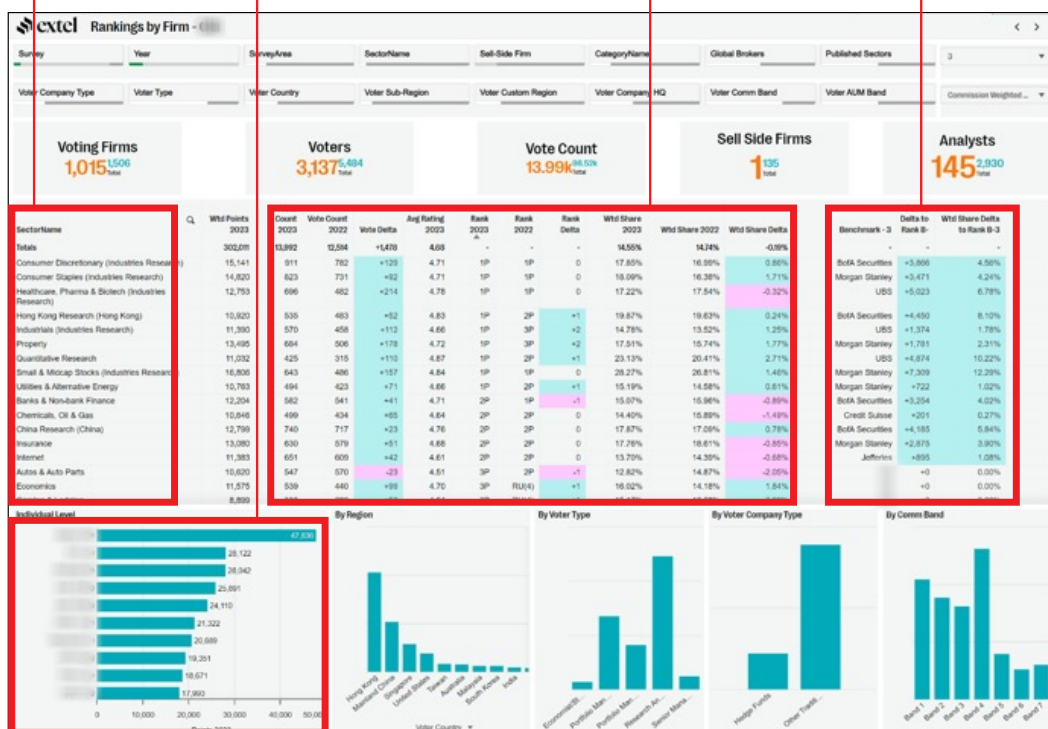


# Rankings By Firm - Sector by Sector Details and Benchmarks

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.

## Sector Breakdown      Contribution of Individual Analysts      Ranks & Share of Points      Benchmark



# 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.

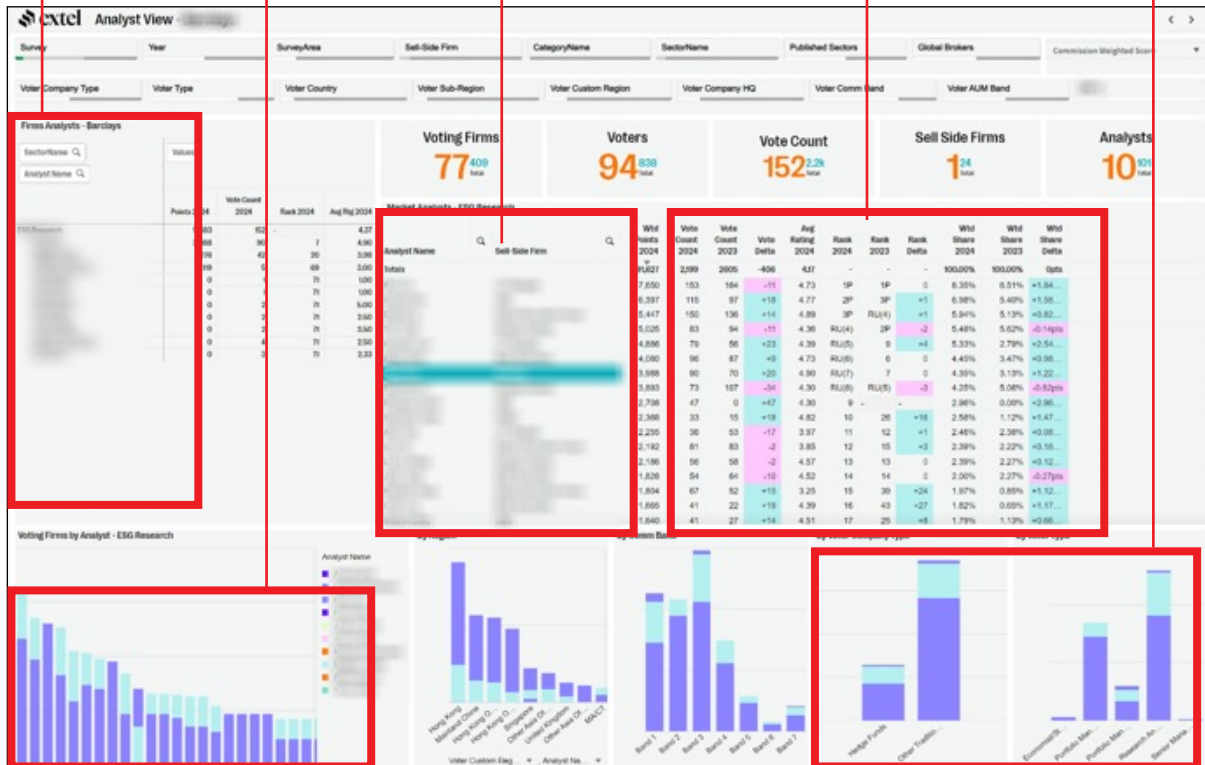
**Ranking of Firm's Individual Analysts**

**Profile of Analyst Votes across Buy Side Firms**

**Top Ranked Analysts within the Filtered Sector**

**Analyst Weighted Points, Share of Vote & Deltas vs Previous Year**

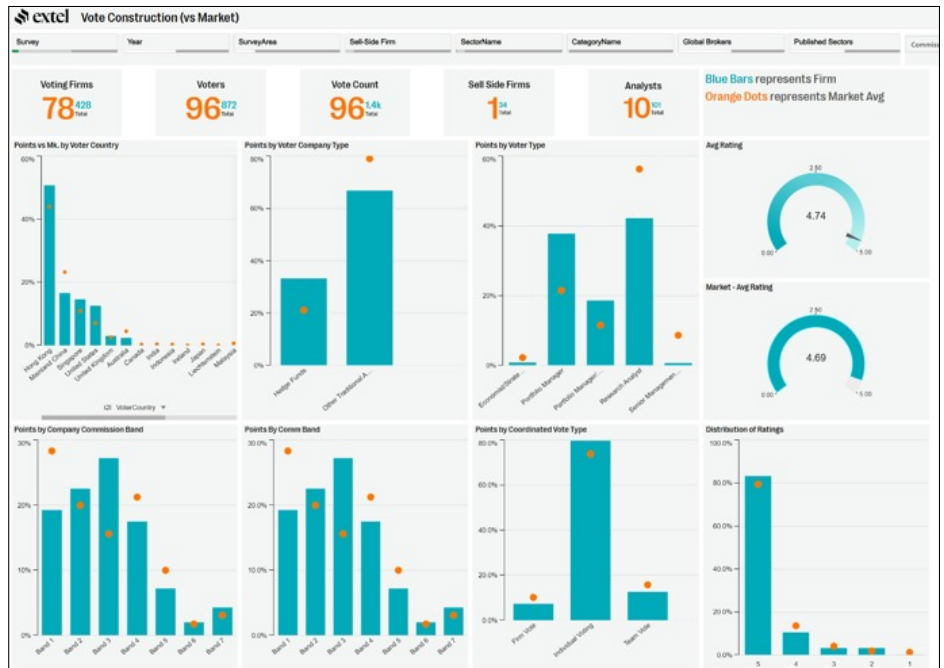
**Drill Down by Voter Categories**



## 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.



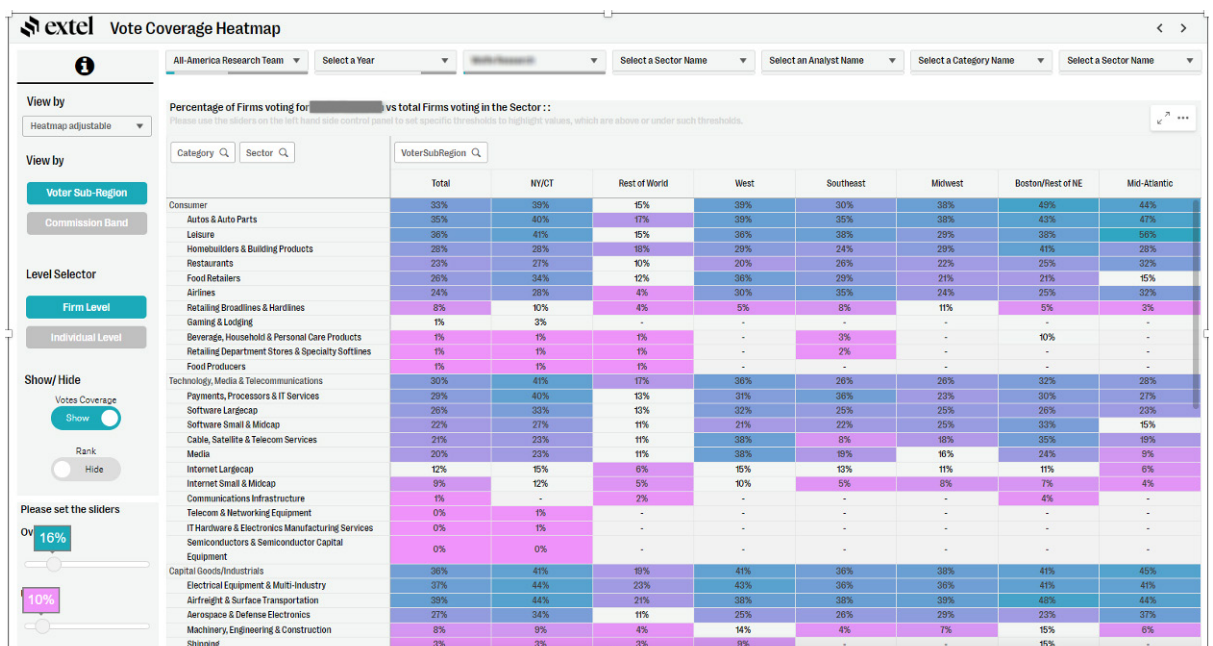
Blue Bars represents Firm; Red Dots represents Market Average

## Vote Coverage Heatmap

A powerful new tool to analyse the depth of voter penetration sector by sector by geographic location and size band to highlight strengths and weaknesses in client coverage.

The heat map and percentages displayed represent the number of firms, Sector by Sector, in the particular demographic who have voted for the selected firm vs the total who have voted in that Sector.

- Select the Sell Side firm to be analysed using the filter bar drop down
- Choose to view by either geography or size band
- Select Firm level Sector Coverage or Individual Analyst views
- Selecting a specific Sector will drill down to a granular matrix of geography vs size band
- An adjustable heatmap view uses sliders to highlight best/worst performing areas



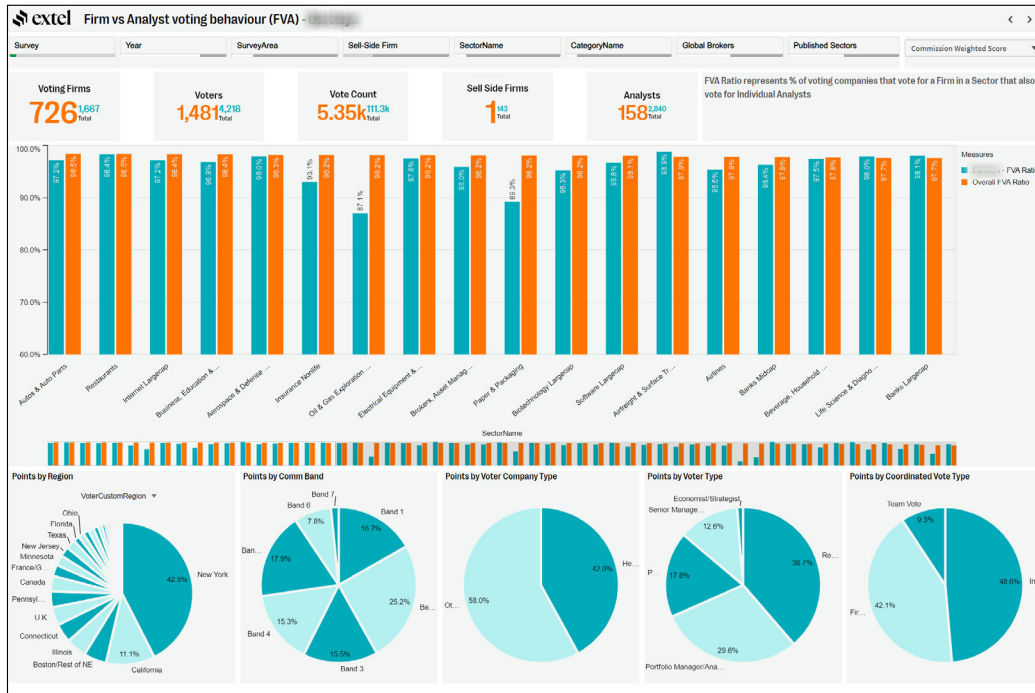


# Firm vs Voter Analyst Behaviour vs Market/Peers

Analyses, Sector by Sector, the number of clients who have voted for the firm in a Sector who have then gone onto to vote for individual analysts and compares it against the survey (or selected peer group) average.

An FVA ratio of 100% means that every client who for the sell side firm in the Sector went onto vote for an individual analyst, recognising the strength of the analyst relationships.

Lower FVA ratios suggest that clients may be voting for the Firm on the basis of the firm's franchise while not recognising specific named analysts.



# Peer Group Selector

Use this sheet to select a list of Sell Side firms to use as a Peer Group comparison in the Vote Construction vs Peer Group and Firm vs Analyst Voting Behaviour vs Peer Group dashboards in place of the overall survey averages.

Use the Peer Group 1 list on the right side of the sheet to select your peer group

Peer Group Selection Table												
Survey												
Year												
Survey Area												
Sector Name												
Category Name												
Global Brokers												
Published Sectors												
Commission Weighted Score												
Voter Company Type												
Voter Type												
Voter Country												
Voter Sub-Region												
Voter Custom Region												
Voter Company HQ												
Voter Comm Band												
Voter AIM Band												
<b>Firms by Commission Weighted Score - Aggregations</b>												
Self-Side Firm	Q	Wtd Points 2023	Vote Count 2023	Vote Count 2022	Vote Delta	Rank 2023	Rank 2022	Rank Delta	Wtd Share 2023	Wtd Share 2022	Wtd Share Delta	
Totals		4,006,693	111,300	101,528	+9,772	-	-	-	-	-	-	
		364,713	9,501	7,858	+1,543	19	29	+10	0.11%	0.06%	0.05%	
		341,978	9,918	6,856	+2,577	29	19	-10	0.08%	0.03%	-0.05%	
		324,767	8,404	7,451	+953	39	RU(4)	35	0.11%	0.16%	-0.05%	
		309,856	8,847	8,727	+120	RU(4)	SP	-1	0.07%	0.08%	-0.01%	
		241,789	7,022	4,901	+2,121	RU(5)	8	-3	0.04%	0.07%	-0.03%	
		214,344	6,180	5,544	+636	RU(6)	5	-1	0.03%	0.17%	-0.14%	
		214,113	5,208	4,539	+669	RU(7)	6	-1	0.03%	0.02%	0.01%	
		207,896	5,547	4,511	+1,036	8	7	-1	0.04%	0.05%	-0.01%	
		177,564	5,009	4,361	+648	9	21	-12	0.03%	0.05%	-0.02%	
		145,351	4,236	4,053	+173	10	12	-2	0.03%	0.03%	0.00%	
		142,553	3,867	3,952	-85	11	10	-1	0.03%	0.03%	0.00%	
		137,659	4,635	4,582	+53	12	13	-1	0.03%	0.03%	0.00%	
		136,462	3,495	2,662	+833	13	14	-1	0.03%	0.03%	0.00%	
		109,306	2,992	2,366	+626	14	15	-1	0.03%	0.03%	0.00%	
		99,339	2,784	4,107	-1,323	15	9	-6	0.03%	0.12%	-0.09%	
		86,548	2,453	2,091	+362	16	16	0	0.03%	0.03%	0.00%	
		75,260	1,920	1,784	+136	17	16	-1	0.03%	0.03%	0.00%	
		67,878	1,600	1,764	-166	18	17	-1	0.03%	0.03%	0.00%	
		54,102	1,470	1,442	+28	19	19	0	0.03%	0.03%	0.00%	
		52,280	1,564	1,340	+224	20	20	0	0.03%	0.03%	0.00%	
		44,180	1,163	1,105	+58	21	21	0	0.03%	0.03%	0.00%	
		32,043	1,105	971	+134	22	22	0	0.03%	0.03%	0.00%	
		31,379	730	862	-132	23	23	0	0.03%	0.03%	0.00%	
		27,864	624	746	-122	24	25	+1	0.03%	0.04%	-0.01%	
		22,266	686	776	-90	25	24	-1	0.03%	0.03%	0.00%	
		21,910	509	578	-69	26	26	0	0.03%	0.03%	0.00%	
		21,184	658	492	+166	27	30	-3	0.03%	0.04%	-0.01%	
		18,967	539	510	+29	28	27	-1	0.03%	0.03%	0.00%	
		19,729	601	592	+9	29	28	-1	0.03%	0.03%	0.00%	
		17,863	478	270	+208	30	33	-3	0.03%	0.03%	0.00%	
		16,050	375	422	-47	31	29	-2	0.03%	0.04%	-0.01%	
		15,881	336	269	+67	32	31	-1	0.03%	0.03%	0.00%	
		14,977	485	389	+96	33	32	-1	0.03%	0.03%	0.00%	
		12,193	316	48	+268	34	69	-35	0.03%	0.05%	-0.02%	





An Institutional Investor company

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