



DATAWISE USER MANUAL

Usability - DATAWISE Dashboards e DATAWISE Insights

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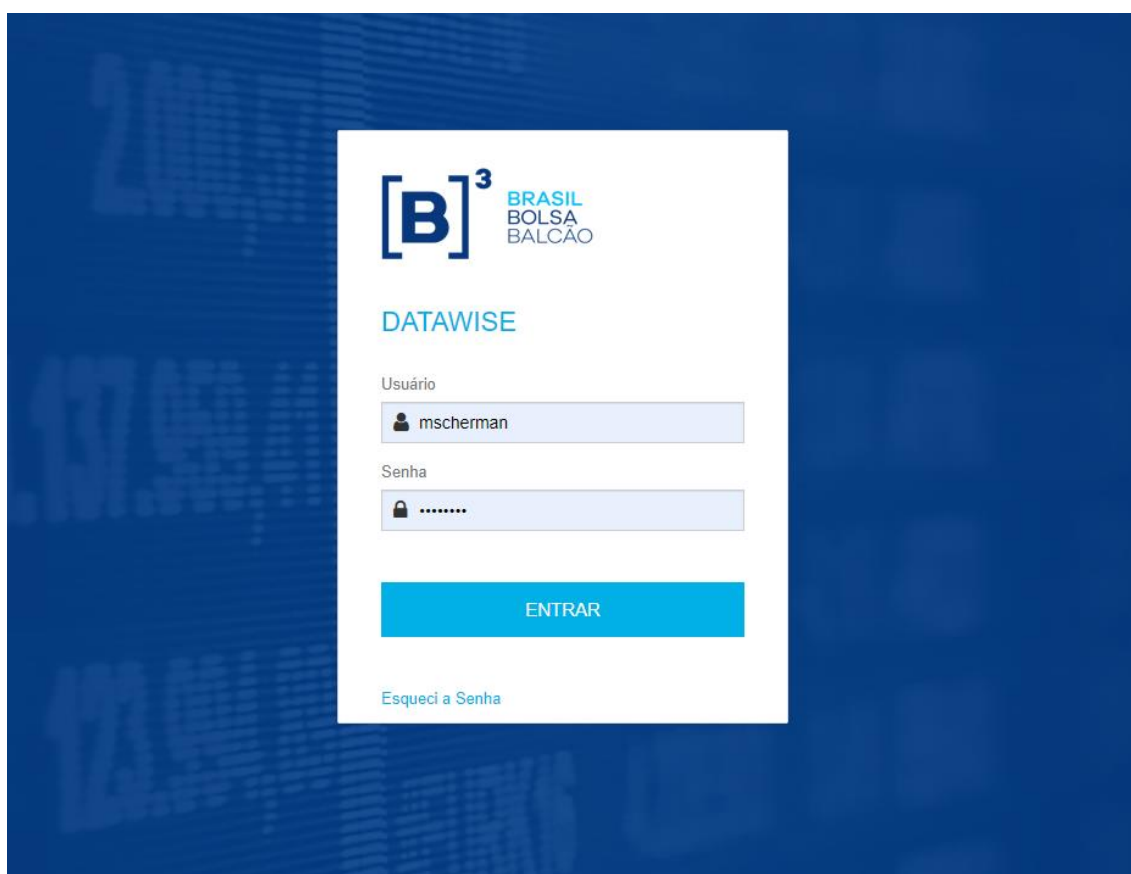
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1 DATAWISE USER MANUAL

In this manual, we will present the the DATAWISE platform usability and the usability of the DATAWISE modules whose products are in the form of interactive dashboards, namely, DATAWISE Dashboards and DATAWISE Insights. For specific information about the usability of products within these modules, please consult the specific manual about that product.

2 PLATFORM ACCESS



For users to access the DATAWISE platform, they need to log into the link below by entering their username and password:

- <https://datawise.b3.com.br/analytics/home>

- Both the username and the password will be sent to the user by e-mail:

Username: Usually the username is composed of the **initial letter of your first name + your last name**, both in lowercase.

Password: A temporary password will be sent and it must be changed on its first use.

I Forgot my Password: If the user forgets their password, they should click on "I Forgot my Password" to be directed to a new page with password recovery or change options.

Esqueci minha Senha

Tipo de documento

Selecione... ▼

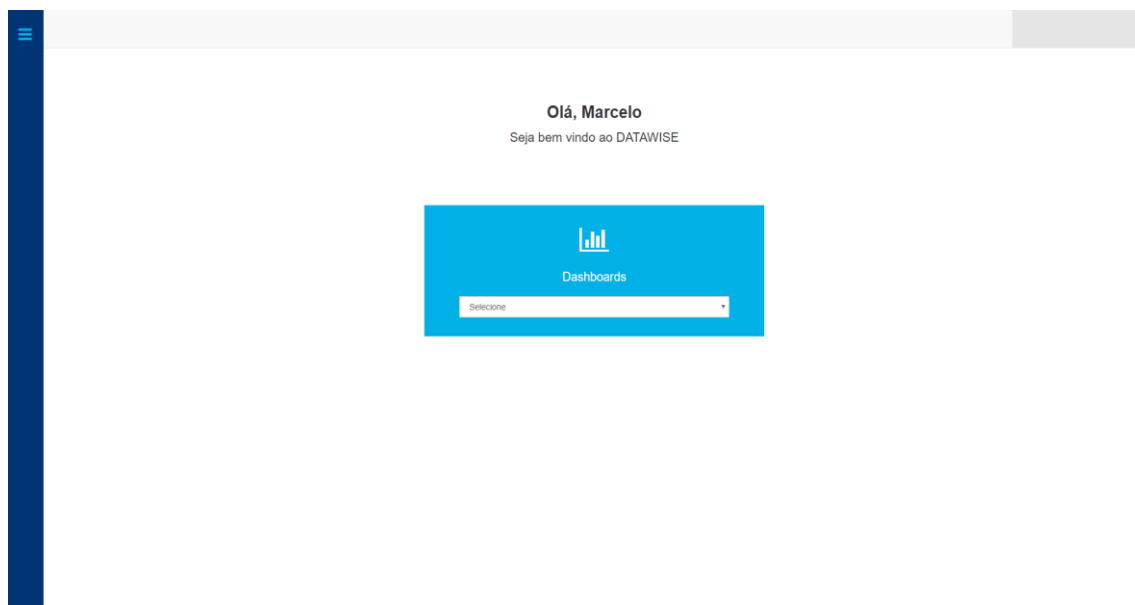
Documento

Login

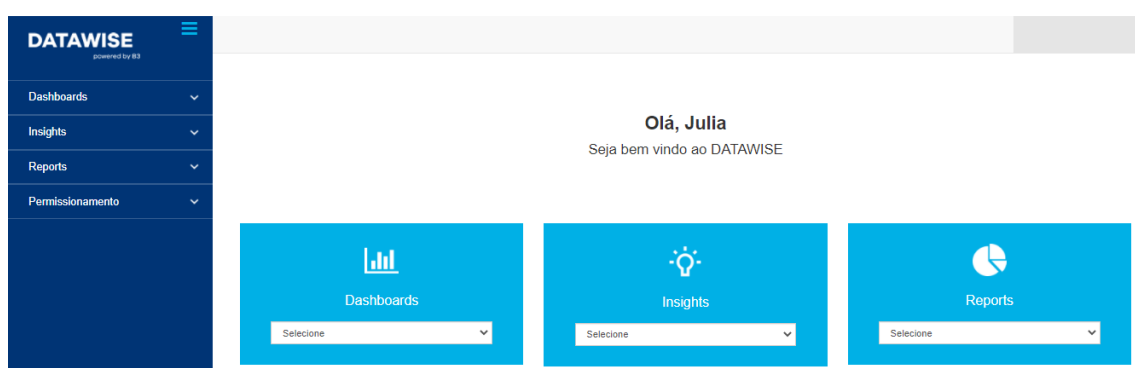
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3 HOMEPAGE



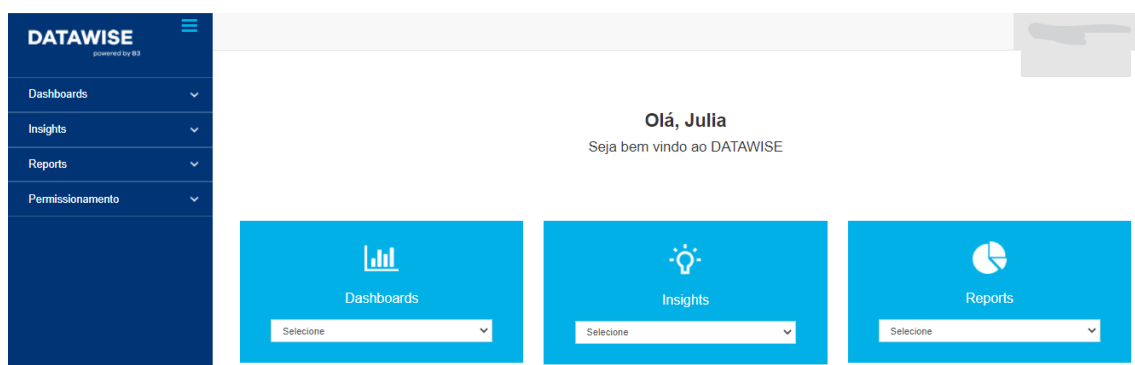
After the user enters the platform, they will be directed to the DATAWISE homepage. There are up to 3 access options within the platform: Dashboards, Insights and Reports.



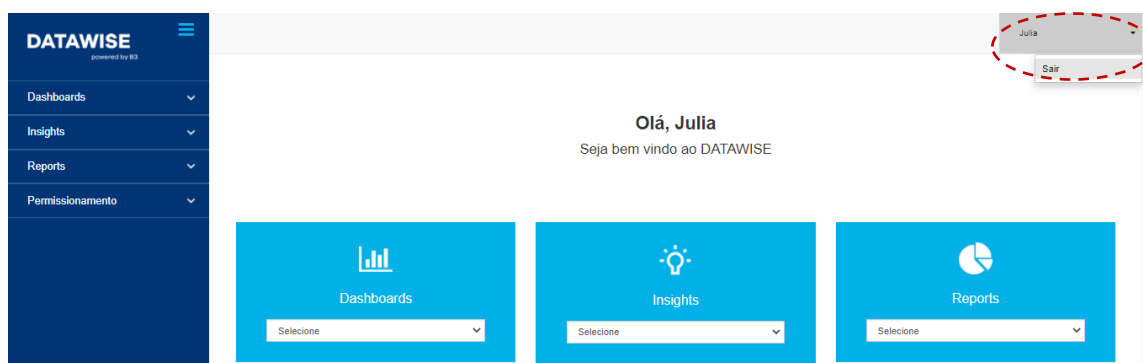
In the upper left corner is the menu bar. By clicking on the 3 bars in light blue, users may check which Dashboards are available for query.



It should be noted that there are two different paths that the user can take and in both paths the available dashboards will be the same.



When clicking the logged in username, it is possible to log out.



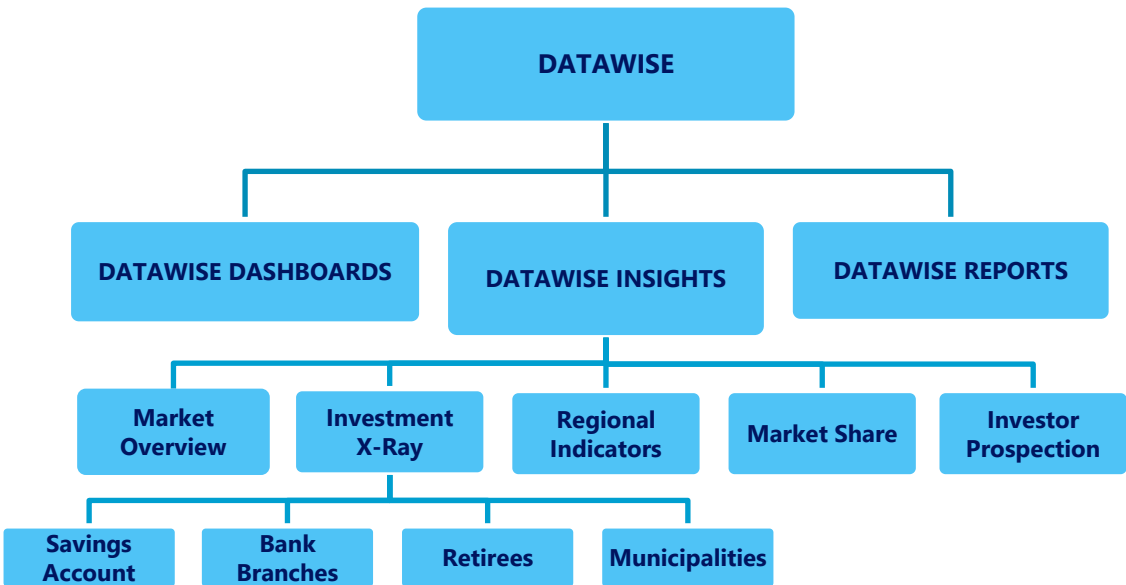
When logging into the desired project, the user will view the available dashboards.

If any dashboard is not available as contracted, please write to our support team at produtosdedados@b3.com.br

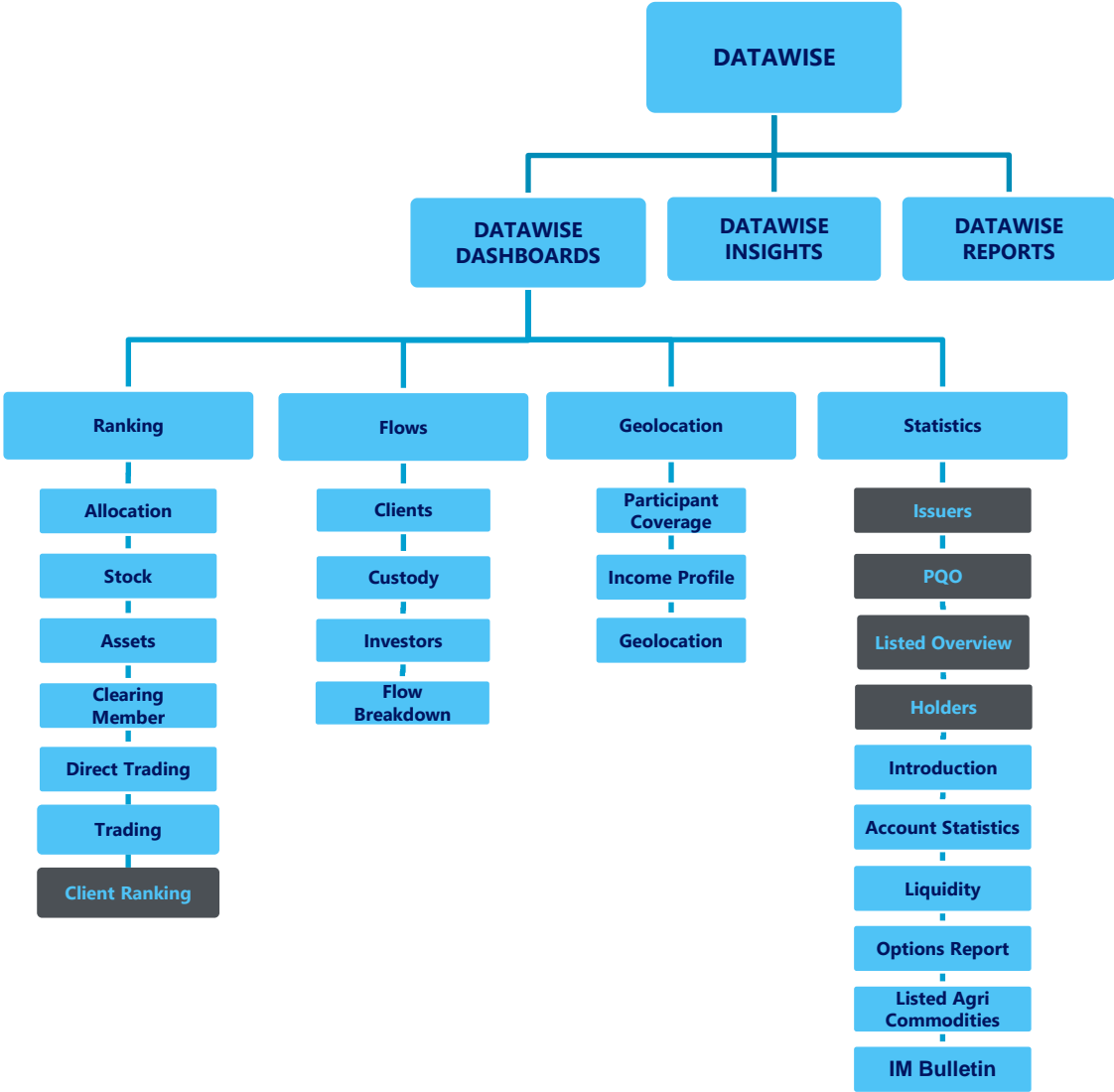
4 DATAWISE DASHBOARDS AND DATAWISE INSIGHTS MODULES

Both modules are in the form of interactive dashboards. We present below a few features to facilitate the usability of these available dashboards and products.

4.1 Products available on DATAWISE Insights



4.2Products available on DATAWISE Dashboards



*The dark shaded dashboards above are specific to a type of client, for example, the Issuers and Holders dashboards are intended for listed companies, the PQO dashboard for brokerage houses and the Listed Overview and Client Ranking dashboards for the Buyside.

It should be noted that the Flow Breakdown, Trading Ranking, Allocation Ranking, Stock, Clearing Member Ranking, Client Flow, Geolocation, Geolocation Participant Coverage, Geolocation Income Profile, Instrument Ranking and Direct Trading dashboards are contained in the Equities (BOVESPA), Derivatives and Futures (BM&F) and Securities Lending (BTB) view.

Particularities of the DATAWISE Dashboards module:

- Dashboards with Equities (BOVESPA) data are always delivered in the financial volume view and it is possible to cross them over with the share volume.
 - Dashboards with Derivatives and Futures (BM&F) data are displayed in the contract volume view.
 - Dashboards with Securities Lending (BTB) data do not display the buy and sell view, but the borrower and lender view.
 - Views are displayed both in Portuguese and English, thus meeting Brazilian and international client demands.
- **Example of assets**
 - **BOVESPA:** PETR4; BOVA11; VALE3; MGLU3; IMABETF11H; BOVB11G; IBOVN110; ABEVO21; IBOVB117; PETRA300, etc.
 - **BM&F:** WINV19; DOLX19; DOLV19; DI1F20; OZ1D; SCSZ902, etc.
 - **BTB:** NTCO3; ABEV3; ITUB4; BBDC4; BOVA11; VALE3; PETR4; MRVE3; ELE3, etc.

4.3 Filters

Multiple or single value filters with drop down list

Visão	Período	Data Início	Data Fim
Compras/Vendas	Últimos 30 dias	7/1/2019	7/31/2019
Mercadoria	Vencimento	Tickers	
(Tudo)	(Tudo)	(Tudo)	

Multiple or single value filters allow users to choose different values from those available in the drop down list.

DATAWISE has the intelligence to generate the "filter's filter", namely:

Let us suppose the ABEV Commodity. When filtering it, as well as the available current data on your trading, the Tickers and Maturity filter will only bring the instruments related to that commodity. For example: ABEV3; ABEV3G; ABEV3T; ABEVA51; ABEVX204.

It should be noted that all available data can also be filtered taking into account the chosen Investor Category and period.

Note:

1- When filtering Start Date and End Date, don't forget to change the Period filter to Date Selection.

2- When searching for a specific commodity or ticker, don't forget to click on "All" to deselect all the items available in that field. After defining the items to be filtered, it is necessary to click on Apply for the selection to be loaded.

Action Filters

Categoria Investidor (clique para filtrar)		
INVESTIDOR NÃO RESI..	420.7 bi	43%
FUNDOS	356.5 bi	36%
PESSOA FÍSICA	155.3 bi	16%
PESSOA JURÍDICA (NÃO..	6.2 bi	1%
INSTITUIÇÃO FINANCEI..	49.5 bi	5%
Instrumento (clique para filtrar)		
VISTA	860.3 bi	87%
EXERCÍCIO DE COMPRA	76.0 bi	8%
INTEGR. E RESGATE	17.0 bi	2%
OPÇÃO DE COMPRA	12.6 bi	1%
TERMO	10.0 bi	1%

Action filters allow filtering from a click on certain data and interacting together with list filters. This type of filter is available on several dashboards, such as Rankings, Geolocation, etc.

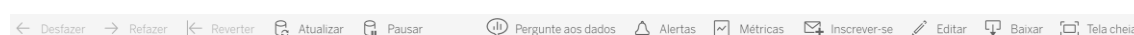
Note:

By pressing the Ctrl key, you can select further action filter options to display the data you wish to assess.

4.4 Tips on tools



Dashboards are easy to navigate via the menu above. Therefore, it is not necessary to go back to the previous page to have another view. Users can click on the dashboards available at the top of the screen or click on the drop down list to choose the dashboard they wish to assess.



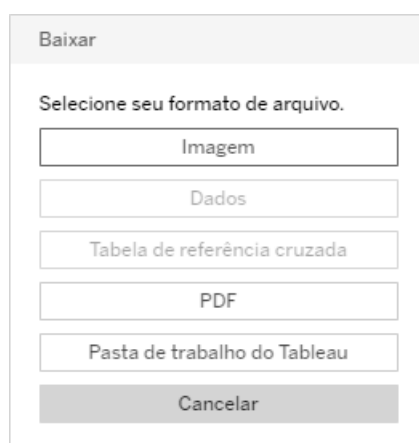
At the bottom of the dashboards there are buttons that can help users with their queries.

Undo, Redo and Reverse: These are functions that, as the name suggests, allow users to undo, redo or reverse a certain action. These alternatives are assigned when a user has set up some robust filters for their assessment and needs to go back a few steps. If you need to go back to the dashboard's default view, click on Reverse.

Update: This function allows loading new data specifically on DATAWISE. It can be used to reload the view when there is a cache problem or if the view has changed from its original configuration.

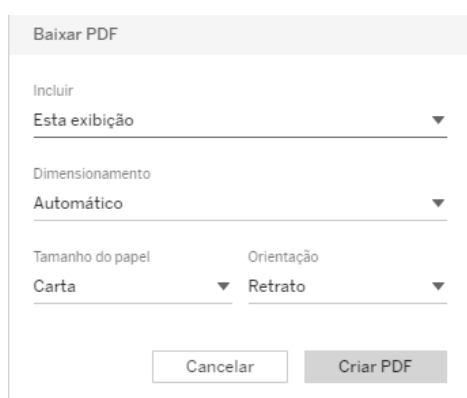
Pause: This is a function created to make the user's life easier. Through it, users can carry out all the desired changes and filters during the pause and, once everything is done, press play to load the filters.

Download: The Download function allows users to download the dashboard view as it is set up/filtered in the user's view. Therefore, the user can download it as an image or pdf. The file may contain the dashboard or dashboard lists separately.



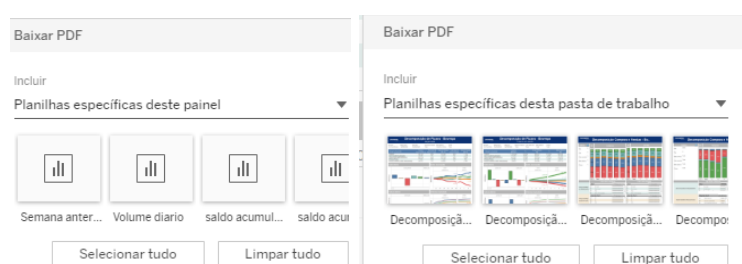
A dialog box titled "Baixar" (Download) with a light gray header. Below the header, the text "Selecione seu formato de arquivo." (Select your file format.) is displayed. There are six buttons stacked vertically: "Imagem" (Image), "Dados" (Data), "Tabela de referência cruzada" (Cross-reference table), "PDF", "Pasta de trabalho do Tableau" (Tableau workspace), and "Cancelar" (Cancel). The "Cancelar" button is highlighted in a darker gray.

If the chosen download format is an image, the user can simply click on this option and the file will be automatically downloaded. On the other hand, if the user chooses to extract the data in PDF format, when selecting this mode a menu will open so the user can configure as they please:



A configuration dialog box titled "Baixar PDF" (Download PDF) with a light gray header. The dialog contains three sections with dropdown menus: "Incluir" (Include) with "Esta exibição" (This view) selected, "Dimensionamento" (Scaling) with "Automático" (Automatic) selected, and "Tamanho do papel" (Paper size) with "Carta" (Letter) selected. To the right of the paper size dropdown is the "Orientação" (Orientation) dropdown with "Retrato" (Portrait) selected. At the bottom, there are two buttons: "Cancelar" (Cancel) and "Criar PDF" (Create PDF), with the latter being highlighted in a darker gray.

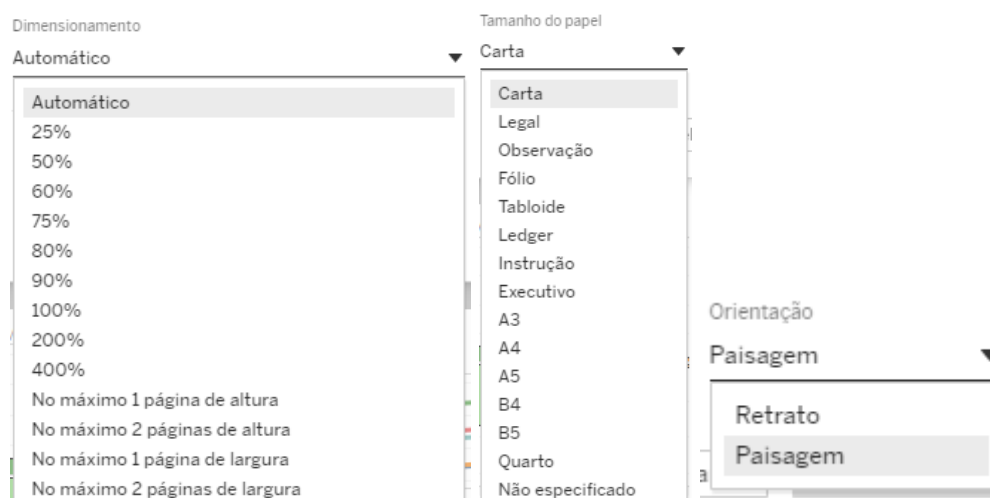
It is possible to include specific worksheets from the displayed dashboards or from all dashboards. Users can also include only a few dashboards for their assessment. If the chosen option is to leave it as "This view", the user can download the current dashboard as it is displayed on the screen. However, there are scaling, paper size and orientation options.



Some options are disabled for compliance and data security reasons.

Important Tips

- **Scaling:** The auto mode is recommended as it generates the best image definition on the PDF.
- **Paper Size:** The "letter" format allows elements to be fitted into the ideal paper size and to be displayed as desired.
- **Orientation:** Between the available "Portrait" and "Landscape" options, the latter option is recommended as the Portrait option may cut parts of the image. The Landscape orientation allows fitting elements properly into the paper.



Full Screen: This function allows users to open the dashboard in full screen, depending on the size of the display screen. The larger the screen, the better the display quality.

5 SERVICE TEAMS

Take a major step and optimize your decision making. Explore our products. If you have any query, talk to our team.

Any query? Talk to us

DATAWISE Sale: produtosdedados@b3.com.br

Contracting: contratacao@b3.com.br

Technical Support: dataservices@b3.com.br