INVESTOR PROSPECTION

DATAWISE Insights

[Data de Publicação]

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1 PRODUCT DESCRIPTION WITHIN THE DATAWISE SERVICE

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| Market Overview | Investment X-Ray | Regional Indicators | Market Share | Investor Prospection |

| Savings | Bank Branches | Retirees | Counties |
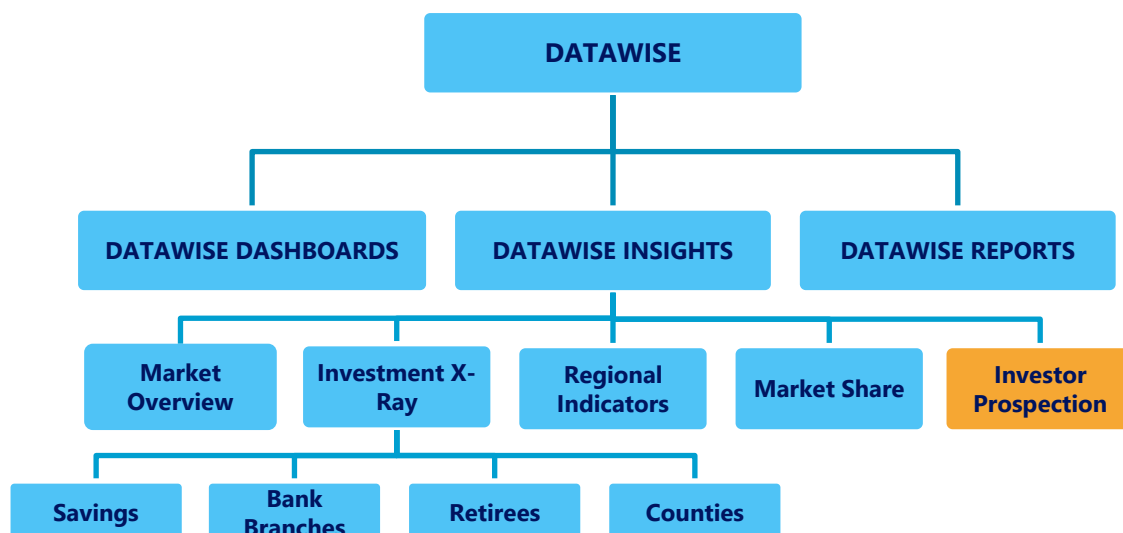
The DATAWISE product was created by B3 with the aim of helping its clients in strategic decisions consolidating various reliable and/or sensitive data in the form of interactive dashboards (DATAWISE Dashboard and DATAWISE Insights) and reports (DATAWISE Reports). It should be noted that as stated in the Commercial Policy, the DATAWISE service does not allow the distribution or redistribution of data.

Each of these modules can be contracted separately as well as their products (individual dashboards and reports), according to the client's intention. Through the interactive panels it's possible analyze the behavior of stocks (BOVESPA), derivatives and stock futures (BMF) and rental of stocks (BTB) with DATAWISE Dashboards or analyze individual investors' behavior with DATAWISE Insights. Already in DATAWISE Reports you can analyze trading and post-trade asset data, mainly from the OTC market thought reports with raw data (Data Report) or worked reports (Market Report).

In this manual we will show the Investor Prospection dashboard layout, data and filters contained in the DATAWISE Insights module.

2 GENERAL DESCRIPTION OF AVAILABLE DASHBOARDS

The DATAWISE Insights Investor Prospection product allows users to build customized metrics and view data compiled from other DATAWISE Insights products through two interactive dashboards – General Regional and Ranking by Region.

The data for building these dashboards come from public data made available from the Central Bank of Brazil, Brazilian Social Security, Brazilian Internal Revenue Service and the Brazilian Institute of Geography and Statistics (IBGE) together with data from B3.

3 GENERAL REGIONAL COMPARATIVE DASHBOARD
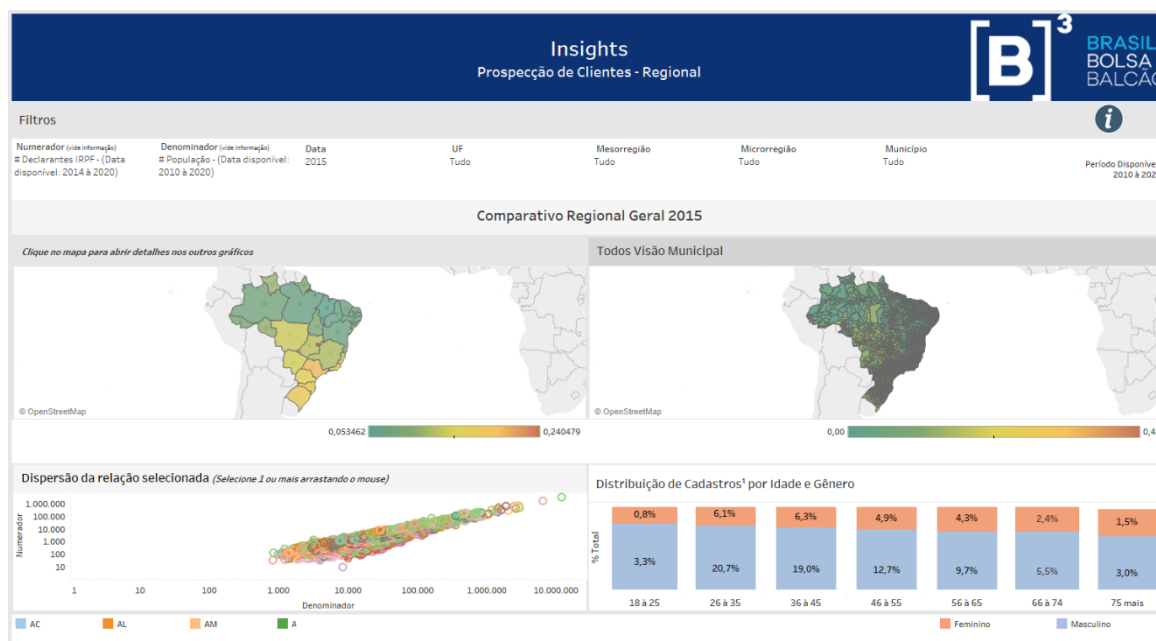
In this dashboard you can have an overview of the Brazilian State (UF) or specific data (Municipality) in relation to the ratio of the chosen numerator and denominator, the dispersion of these parameters and the distribution of active registrations with brokerage houses by age and gender.

The colors arranged on the map relate to the ratio between the chosen numerator and denominator. You can interact with the map and hover the cursor over the screen to obtain more information about the regions as shown below:
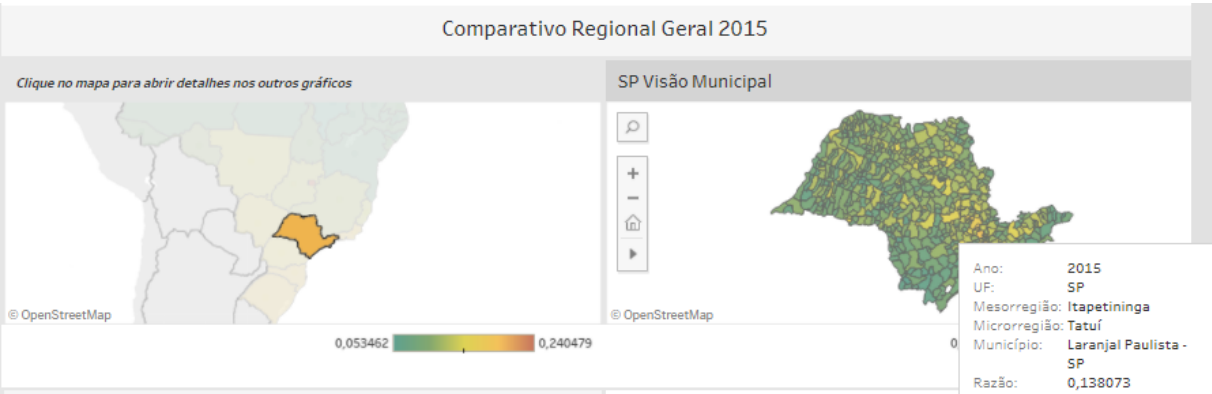
The colors arranged in the scatter plot represent the Brazilian State (UF) and, as in the previous example, by moving the cursor you can view further information about the municipality as shown below:

4   RANKING BY REGION COMPARATIVE DASHBOARD
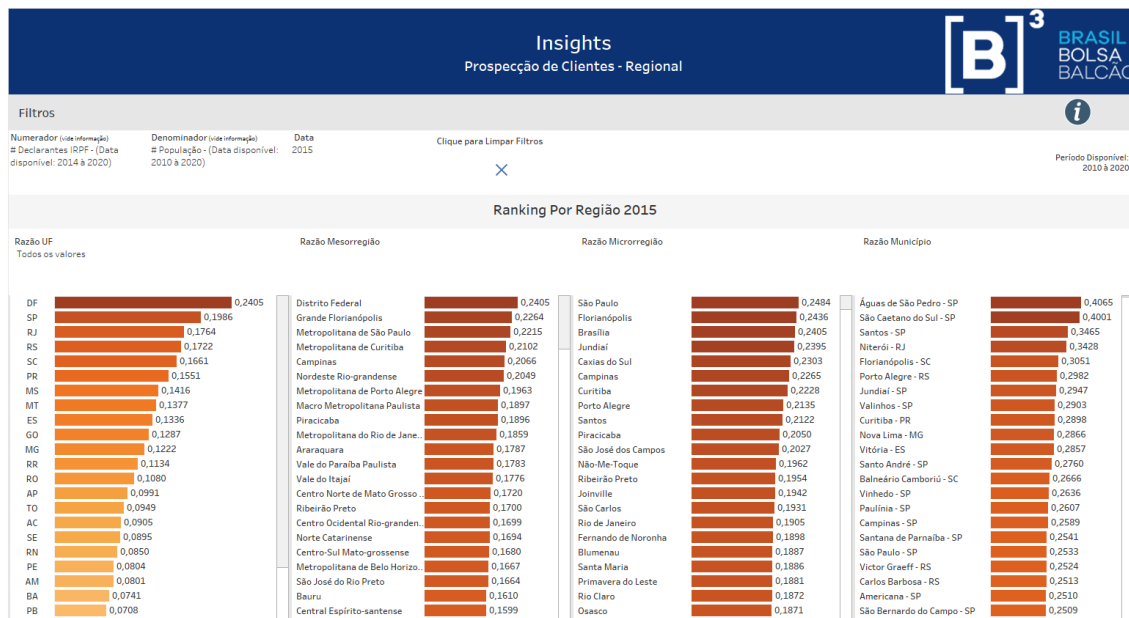
In this dashboard you can have an overview of the ranking by region at Brazilian State (UF) level and the municipality in relation to the ratio of the chosen numerator and denominator.

5   FILTERS

5.1   Numerator and Denominator

5.2   Date

Data may be filtered from 2010 to date and are updated every 2 years.

5.3 Brazilian State (UF)

UF

(Tudo)

This filter enables you to select geographic regions at state level such as SP, RJ BA, GO, MT, etc.

5.4 Mesoregion

Mesorregião

(Tudo)

You can also select data by Brazilian mesoregion such as Agreste Alagoano, Agreste Paraibano, Agreste Pernambucano, Baixo Amazonas, Centro-Sul Paranaense, etc.

5.5 Microregion

Microrregião

(Tudo)

You can also select data by Brazilian microregion such as Piracicaba, Alto do Pantanal, Alto Solimões, Amparo, Bom Despacho. Borborema Potiguar, etc.

5.6 Municipality

Município

(Tudo)

You can select municipality data such as Saltinho, Acauã, Piracicaba. Abaeté, Água Doce, Nazaré, Natal, etc.

6 METRICS

6.1 Equity Stock

Equity stock data for individual investors relate to the last business day of December each year and comprise data such as cash equities, FII, Equity ETF, Unsponsored BDR, Sponsored BDR, and Investment Funds.

6.2 Retirees

The data considered were retirees by age and time. In relation to the long-term savings account balance period, these data represent the lowest observed value of the total savings account balance over a 12-month monthly variable window, while the short-term data represent the difference between the total savings account balance and the observed value of the long-term savings account.

For data on retirees from Social Security and for the years 2019 and 2020, the 2018 data were replicated.

6.3 Active Registration

In active registration we display the annual closing view for individual investors with active registration status with a brokerage house (without position verification).

6.4 Population

For population data from IBGE for the year 2020, the 2019 data were replicated.

6.5 Assets and Rights

For data on Income Taxpayers/Assets and Rights from Income Tax for the years 2018 to 2020, the 2017 data were replicated.

7   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

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