PURPOSE

Select Scatter Plot View to quickly isolate and identify attractive offerings. Conduct relative value analysis on offerings or pinpoint outliers in portfolio holdings to maximize returns. A

HOW TO USE THIS FEATURE

- Select Portfolio, RUNZ or IMGR Views from the dropdown. Run a list by clicking ⟳ . B

- Select Scatter Plot. A

- Set the X and Y axes. C

- Click the Filters button. D Using the pop-out menu, filter attributes, use the slider to set minimum and maximum for e.g., Ask Yield to Worst. E

- Set bubble size C and adjust your view to your liking using the smart filters. See separate User Guide for Managing Filters.

- Toggle to Grid, Heatmap or Summary Views for further portfolio-level analysis. A

QUICK TIPS

Filters
Smart filters D are also accessible in Grid View. Drill down to the attributes you care about most for extremely efficient analysis.

Assessing an Offer List
You can now upload bid or offering lists as an Excel file (export from IMGR or the RUNZ manager). Click the up-arrow to upload a list and follow the prompts. See the Getting Started - IMGR or Getting Started - RUNZ User Guides for more details.