

BankFocus Migration

The new version of the BankFocus platform is now live and it's time to switch to a modern, more streamlined interface and the new portfolio monitoring functionality.

The Portfolio Landing Page is the default start page for the BankFocus platform. It provides a way to actively monitor the institutions in your portfolio.

The Landing Page contains the following widgets:

- Risk Metrics showing the relevant risk metrics and their evolution for banks, including capital adequacy, asset quality, liquidity/funding and earnings.
- Ranking ranks all institutions in your portfolio by risk metrics.
- News and Research recent news and research for the institutions in your portfolio.
- Stock Price and CDS Evolution equity and credit market information for banks.

The Landing Page is driven by your saved **Entity Sets**. You can easily switch between different entity sets to monitor different types of banks or various geographies. If you don't have a saved Entity Set yet, the Landing Page will load a default set of 25 major banks worldwide.

The new interface

BankFocus										
Dashboard	:								mu	ISD (6
Key Information	~	Default record set								~
Neure & clearle	~	< > Key Information								
Ratings announcements		Rick matrice						Banking		
Research		Capital Adequacy Asset Cuality	Unuldty/Fundie	r Famines			Options 😔	Kanang		
Stock and CLD	Ň		Common Equity / C	Tier 1 ratio	Total capital ad	Total equity / Total ass	Basel II leverage r	Total assets	💌 Value (m US	SEN
)		INDUSTRIAL & COMMERCIAL BANK	12.98% 🗡	13,43% 🗡	na.	8.47% 🗡	n.a.	1 INDUSTRIAL &	4,041,958	,
<u>,</u>		AGRICULTURAL BANK OF CHINA LL.	11.55% 🗡	12,13% 🗡	na.	7.41% 🗖	n.a.	2 AGRCULTURA	3,799,208	
		EANK OF CHINA UMITED	11,41% 🗡	12.27% 🗡	na.	8.11% 🗡	na.	3 BANK OF CHIN	3,103,358	,
		MITSUBISHI UFJ FINANCIAL GROU	12.23% 💊	13.00% 🖌	na.	5.55% 💊	11.4	4 MISUBSEU.	2,005,025	
		JPMORIGAN CHASE & CO	12.00% 🍾	13.68% 🖌	15.53%	9.79% 🖌	8.07%	5 JPMORGAN C	2,622,532	1
		Nows and ressarch Company and market news INSA Ratings anonuncements Desearch				Stock price -	and CDS evolution	volution		
		12/02/2020 Shaveholder activities test jPMorgan's Dimon on climate proRT IRAC/RDCK INC 12/02/2020 BRIEF Wells Fares & Ce Announces Restemption Of its Series				140 150 100 100 100 100				
		WELLS FARGO & COMPANY 12/02/2020 BRIEF-Wells Fargo & Co Announces Partial Redemption Of It., RT WELLS FARGO & COMPANY								
		12/02/2020 Deals of the day-Mergers and acquisitions RT AMAZON.COM, INC.				-	FMAM	J J A S O N 2019	D J F 2020	-
		12/02/2020 JP Morgan names new co-heads of ESG equity research for RT BNP PHIBIAS SA				INDUSTRIAL & COM A BANK OF CHINA LIML. I PIMORGAN CHASE & AGRICULTURAL BAN MITSUBISHI URJ RINA				ES
					More >	The entities a can be displa	bove are based on i yed in this graph	the latest news, only listed ent	ities M	lore



Dependent on your current version, your BankFocus migration will require different actions.

Migrate from v3.0

To migrate:

1. Open BankFocus as normal.



- 2. Click on the **Switch to the new interface** banner at the top of the home screen.
- 3. The new interface opens. The landing page is driven by your saved Entity Sets. Switch between different entity sets to monitor different types of banks or various geographies. If you don't have a saved Entity Set yet, the landing page will load a default set of 25 major banks worldwide.
- You now need to import the user-defined content. Individual users are able to view and migrate their own content. Administrators can view and migrate all content. See *Migration Tool* on the following page for more information on migrating data.

Migrate from v4.0

To migrate:

1. Open BankFocus as normal.



- 2. Click on the **Switch to the latest interface** banner at the top of the home screen.
- 3. The new interface opens. Migrating from v4.0 involves little change to your interface. The theme has been updated and the navigation menu is now on the left of your screen in line with other products.
- 4. All user-defined settings are still valid, no further action is required.



Migration Tool

Note:

The Migration Tool is only required for BankFocus v3.0 users

1. Go to My BankFocus > My Settings. Click on Migrate my data.



BF migrating user (19 Settings (1) Variables (1) (?) Entity sets (3) Custom sections to Custom chap Exchange Layouts (2) Lists to Views (2) (2) * Modified this year (2) list with UDVs Older (0) ■ Reports to Books (2) (?) Searches (5) ⑦ * Modified this year (5) French listed active SIFIS Top 50 Net Income - US Top 50 Net income - World

3.

123

Ω.

► Older Cancel

Migrate

Note:

If you cannot see the Migrate my data option, contact support or your account manager.

Expand each section to see all the 2. user-defined data created in your previous version of BankFocus. All data sections are arranged by Data modified this year and Older.

Select any or all items you want to be recreated in the new interface.

Note:

It is recommended that variables are migrated first, followed by other data.

4. Click Migrate to begin the transfer. The progress of all transfers is displayed against the data.

Your o	wn data	Result	Last migrated on			
▼ BF migr	ating user (19)	Migrated (16/19)				
Sear	ches (5) 🕐	Migrated (4/5)				
• N	lodified this year (5)					
	French listed active	Success	09/03/2020 1:11 PM			
	SIFIs	Not Started				
	Top 50 Net income - US	Success	09/03/2020 1:11 PM			
	Top 50 Net income - W. Europe	Success	09/03/2020 1:11 PM			
	Top 50 Net income - World	Success	09/03/2020 1:11 PM			
► Older (0)						

Note:

Success indicates a completed transfer. If the transfer results in a Partially migrated or Not migrated status then contact your account manager for assistance.