

IFIC Statistics Website: Interactive Executive Dashboard User Guide

Last updated: April 27, 2023

The IFIC logo consists of the letters 'IFIC' in a white, bold, sans-serif font, centered within a dark grey square.

THE INVESTMENT
FUNDS INSTITUTE
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L'INSTITUT DES FONDS
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DU CANADA

IFIC Statistics Website: Logging In

Visit www.ificstats.ca

New users (create an account):

1. Click the **Sign Up** button.
2. Choose “My Company is an IFIC member”.
3. Select your firm from drop down menu.
4. Enter user details.
5. Submit new user request and await review and approval from IFIC Staff.

Existing Users:

1. Enter log in email and password.
2. Click **Sign Up** button.

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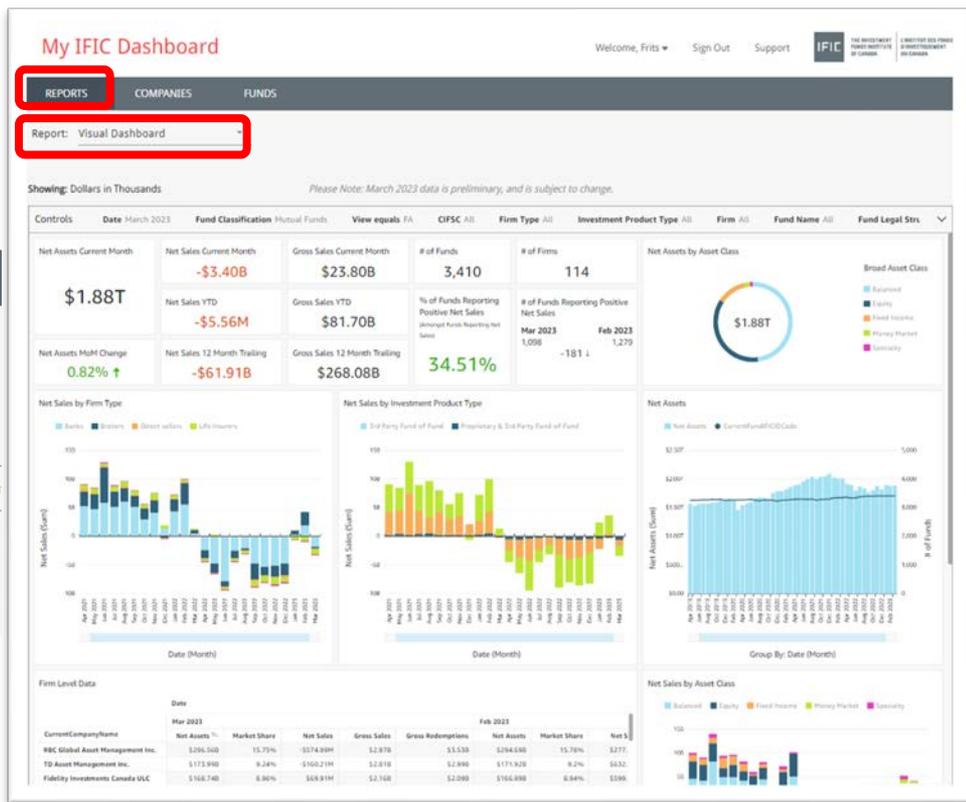
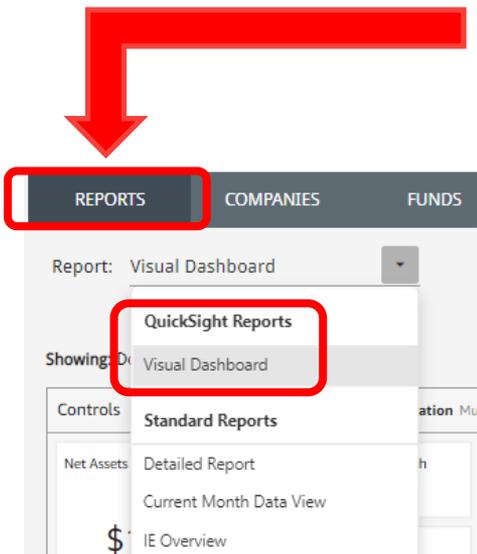
SIGN IN **SIGN UP**

I want an individual subscription
My company is an IFIC member

Location of Interactive Executive Dashboard

Reports tab

1. Within the **Reports** dropdown there is a section called QuickSight Reports.
2. Select **Visual Dashboard**.



Use Controls Bar to Change Default Report Filters

The screenshot shows the IFIC web application interface. At the top, there are navigation tabs for 'REPORTS', 'COMPANIES', and 'FUNDS'. Below this, the 'Visual Dashboard' is displayed. A 'Showing: Dollars in Thousands' indicator is present. A 'Controls' bar is located at the bottom of the dashboard, containing various filter options. A red box highlights the 'Controls' tab, and a red arrow points to a dropdown arrow in the top right of the controls bar.

Net Assets Current Month	Net Sales Current Month	Gross Sales Current Month	# of Funds	# of Firms	Net Assets by Asset Class
\$1.88T	-\$3.40B	\$23.80B	3,410	114	
Net Assets MoM Change	Net Sales YTD	Gross Sales YTD	% of Funds Reporting Positive Net Sales	# of Funds Reporting Positive Net Sales	
0.82% ↑	-\$5.56M	\$81.70B	(Amongst Funds Reporting Net Sales)	Mar 2023: 1,098; Feb 2023: 1,279	

Additional metrics shown include Net Sales 12 Month Trailing (-\$61.91B), Gross Sales 12 Month Trailing (\$268.08B), and % of Funds Reporting Positive Net Sales (34.51%).

The 'Controls' bar at the bottom contains the following filters:

Date	Fund Classification	View equals	CI/SC	Firm Type	Investment Product Type
March 2023	Mutual Funds	FA	All	All	All
Firm	Fund Name	Fund Legal Structure	ESG	ESG Integration and Evalua	ESG Thematic Investing
All	All	All	All	All	All
ESG Exclusions	ESG Impact Investing	ESG Engagement and Stew:	ESG Best in Class		
All	All	All	All		

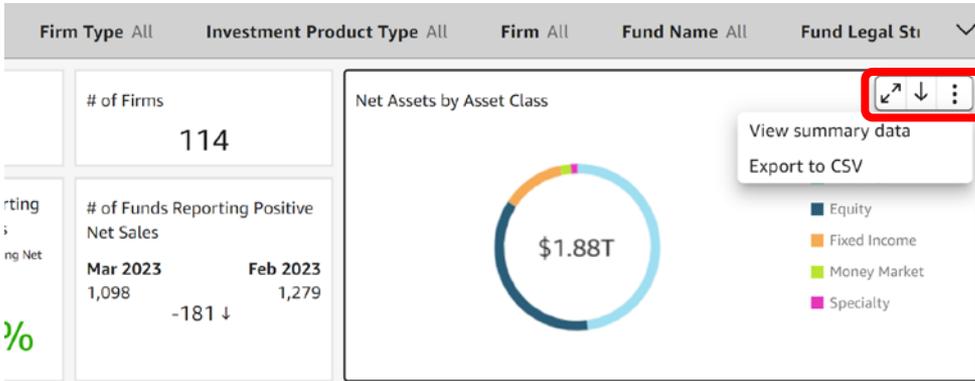
Expand Controls Bar

- Click the downward facing arrow to expand the view of the controls.

Custom Analysis Using Controls

- Create a custom analysis by changing parameters found in Controls Bar.
- Click on **Date** to choose another time period.
- Click dropdowns to change the default filters (parameters) of the dashboard.

Interactive Features of Visuals in Dashboard



Feb 2023	Net Assets	Market Share	Net S
	\$294.69B	15.78%	\$277.
	\$171.92B	9.2%	\$632.
	\$166.99B	8.94%	\$599.

Features

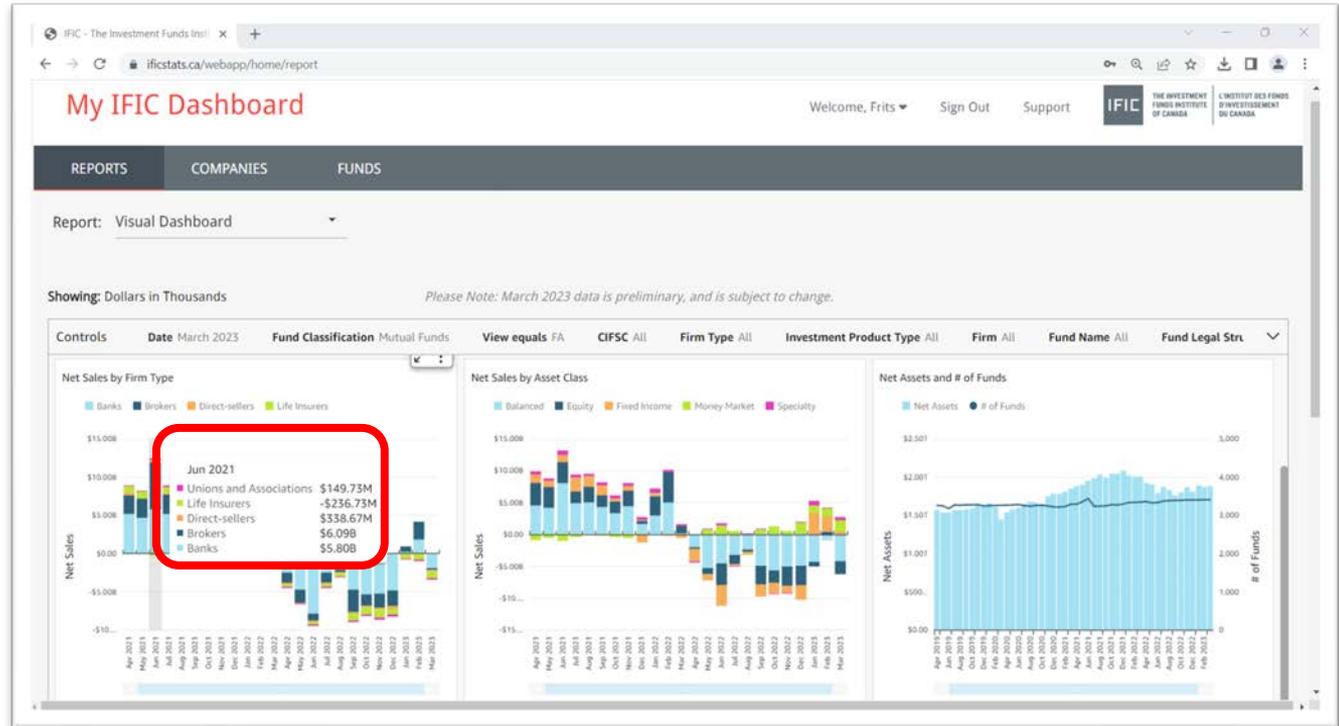
- Hover mouse over top right corner of any visual to enable following features:
 1. Maximize the size of visual. 
 2. Drill down (where applicable). 
 3. View summary data of the visual. 
 4. Export underlying data to CSV. 
 5. Export data in a table to Excel. 
 6. Sort columns in tables by clicking column headers.

Firm Level Data		Date
CurrentCompanyName	Net Assets	Market Share
1832 Asset Management L.P.	Sort ascending	
AGF Investments Inc.	Sort descending	
ATB Investment Management Inc.	\$20.16B	1.07%

Interactive Features of Visuals in Dashboard (continued)

Tooltips

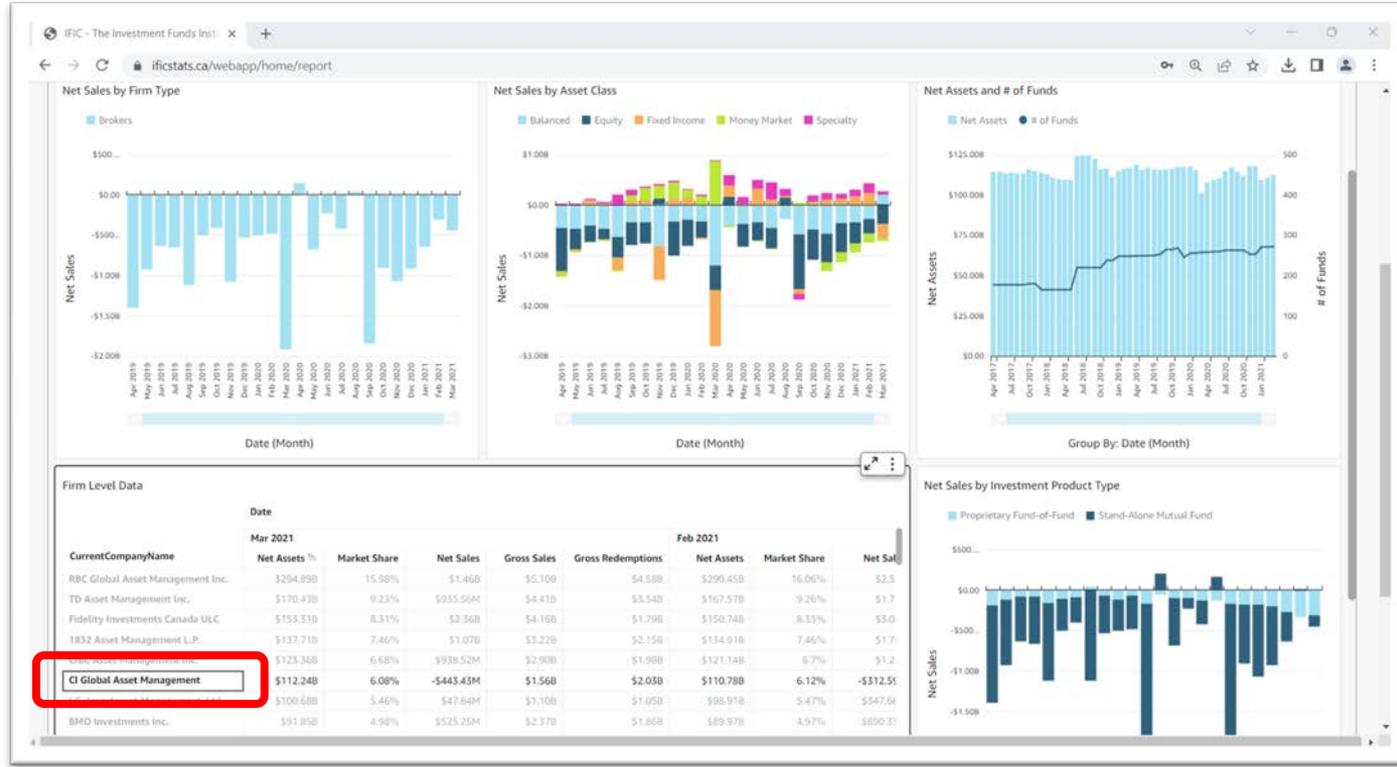
- Hover-based tooltips for visuals in dashboard reveal data points.



Interactive Features of Visuals in Dashboard (continued)

One Click Filtering

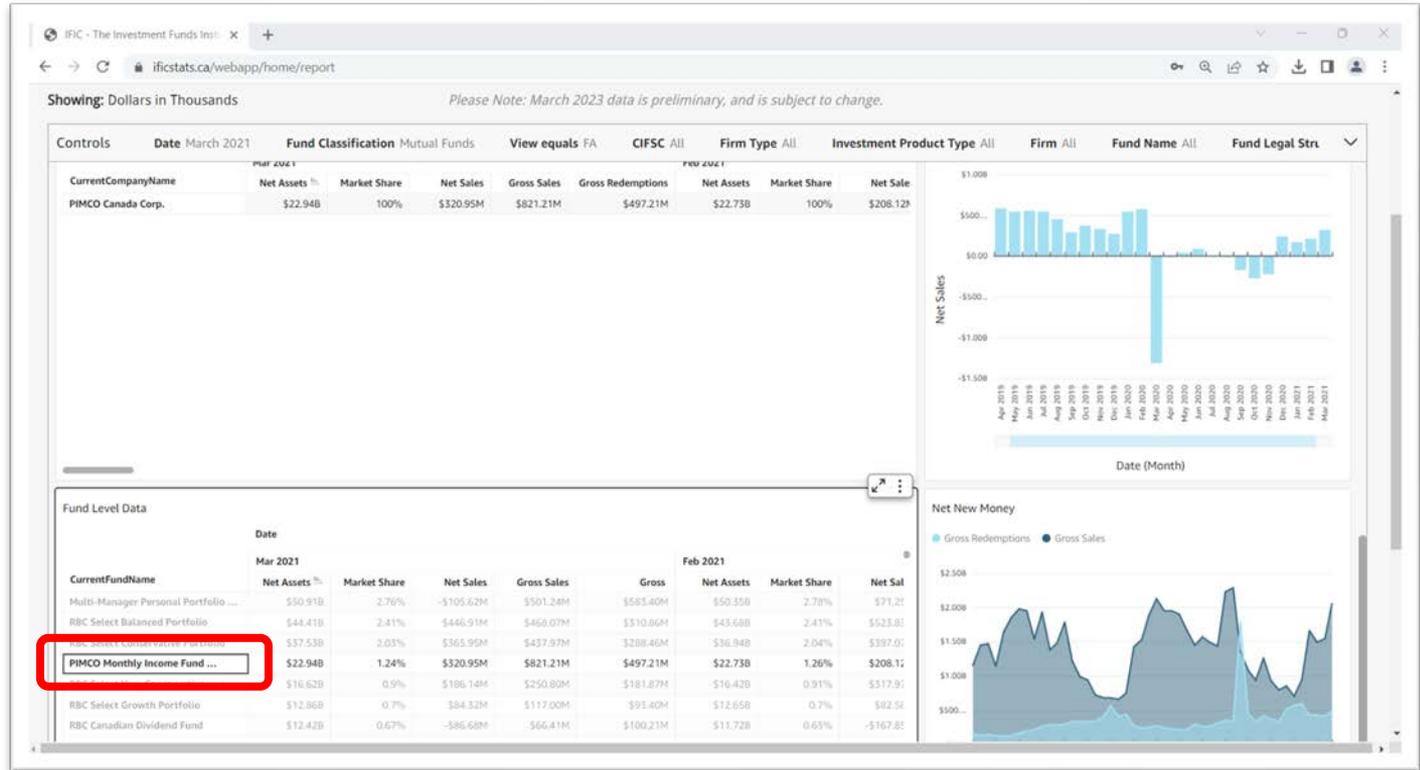
- Filter all visuals in dashboard to a specific firm by clicking a firm name within the firm data table.



Interactive Features of Visuals in Dashboard (continued)

One Click Filtering

- Filter all visuals in dashboard to a specific fund by clicking a fund name within the fund data table.



Questions and Support

- To learn more about the interactive executive dashboard or to book a demonstration, please contact:

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