

Dashboard 2.0 & Data Tie-Out Tool

Pivot May Release

What Changed and Why:

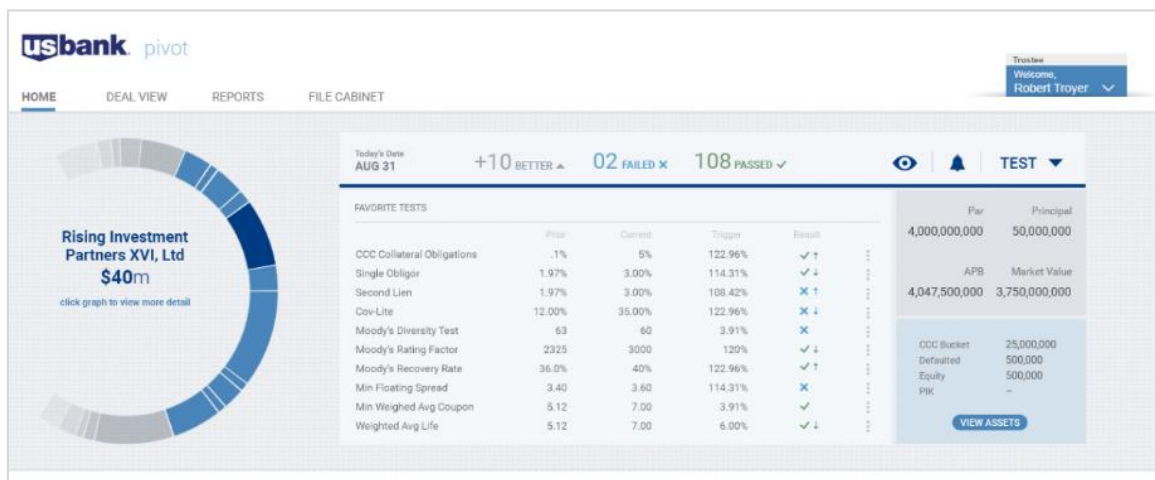
Client feedback received via demos, day-to-day interactions, and independent third party research told us we needed to:

- (1) Provide more detail around account balances, trade activity, test results, and asset characteristics in our dashboard as soon as you log in.
- (2) Create a data tie-out tool that allows you to drag and drop your data files into Pivot and quickly view breaks prior to completing critical tasks.

Dashboard Highlights:

- (1) Three Unique Views: Toggle between Deal, Test, and Cash views by clicking the top right dropdown to get PCV, test results, and daily cash balances.
- (2) Favorites: Reach out to your daily contact at U.S. Bank and let them know the key accounts and test results you want to track in the Cash and Test views.
- (3) Drilldowns: Click to get detailed views behind key data, including: Pending Trades, Past Due Amounts, Top Issuers, Top Industries and Distressed Asset metrics.

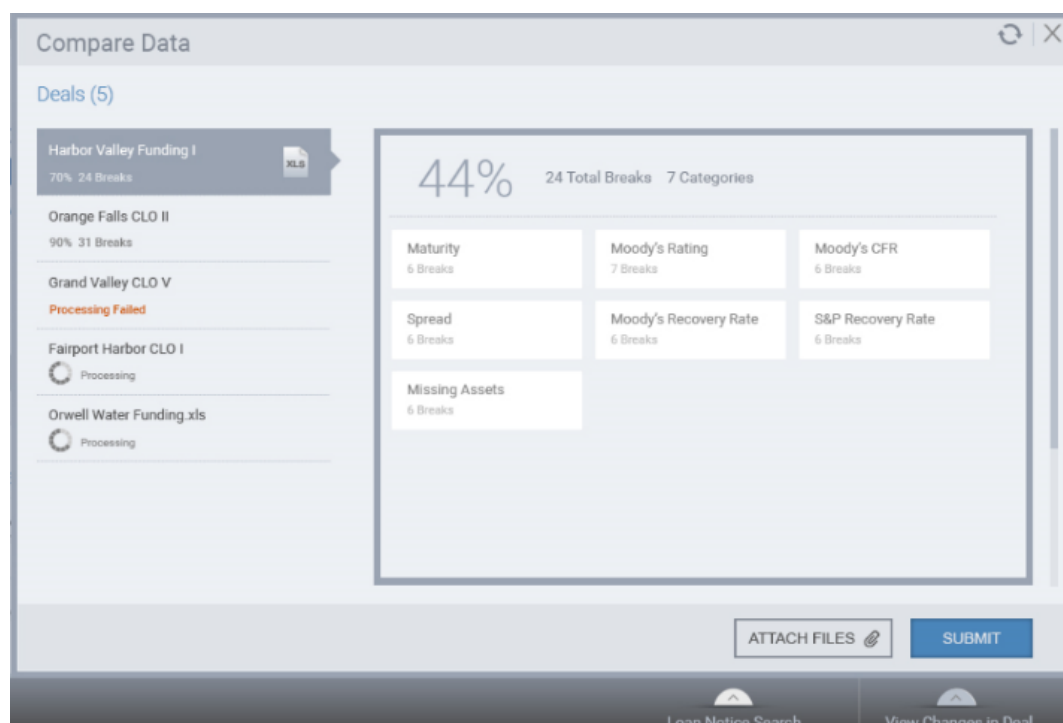
Test View in New Dashboard:



Data Tie-Out Highlights:

- (1) Customized Setup: Reach out to your daily contact at U.S. Bank to discuss getting Pivot set up to consume data in your preferred data layout.
- (2) Real-time Breaks: After getting set up, upload files anytime to view par, ratings, industry, and other data point breaks.
- (3) Multi-deal Analysis: View breaks across all deals and drill into a single deal or category in 1-2 clicks. Submit breaks to notify others.

Data Breaks in Data Tie-Out Tool:



Next Steps:

- (1) Log-in and check out the new dashboard at: <https://pivot.usbank.com/wmss/web/gcts/home>
- (2) Reach out to your daily contact at U.S. Bank for more information on how Pivot can help.

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