USER GUIDE
Settings

MUNIRISK™
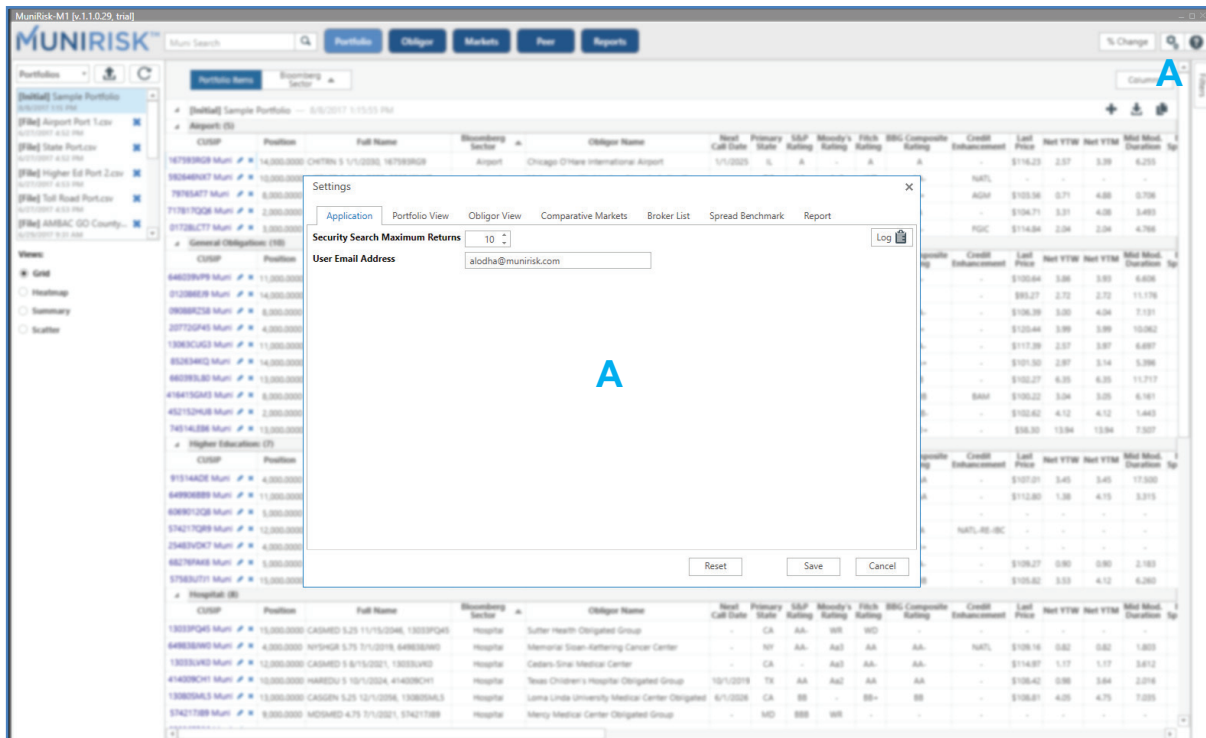
Available on the
**Bloomberg
Terminal**®

CONFIGURE YOUR WORKSPACE

Click the Settings button **A** within the application's fixed navigation bar to open the Settings window and make the workspace your own. Adjust your portfolio heatmap or summary views. Select your own benchmarks. Communicate quickly with key contacts by setting up shortcuts to the Terminal®.
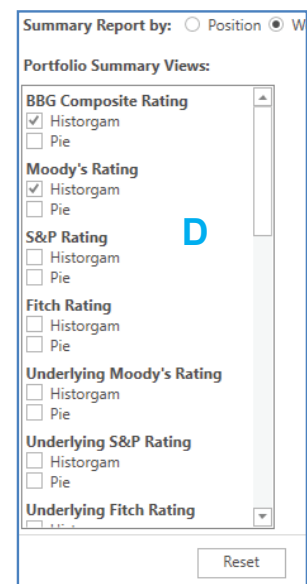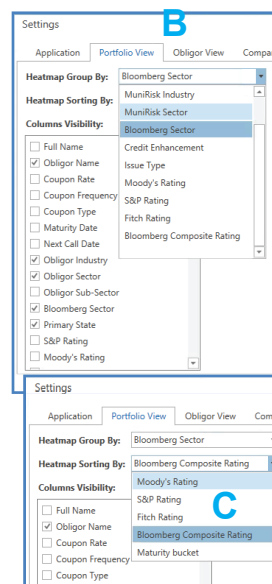

1. General Application Settings

- Search Returns: Set the number of search returns to a smart security search. Maximum is 100.
- Corporate Email Address: While this is optional, to expedite technical support, we recommend all users provide their primary email. *We respect your privacy. Please read our Privacy Policy at www.munirisk.com/privacy-policy/.*

2. Portfolio View Settings for Heatmap:
Customize your Heatmap View to assess layered risk. Select the metric to group your portfolio by, **B** then select the metric you prefer to sort by. **C** (Note: use the Columns button as a shortcut to this menu.)

3. Portfolio View Settings for Summary:
Choose the metrics you would like to view portfolios by and graph format. **D** (Note: use the Summary Views button as a shortcut to this menu.)

CONFIGURE YOUR WORKSPACE, CONT'D

4. Obligor View: *Update coming soon.*

5. Comparative Markets: In **Markets View**, monitor relative market trends across treasuries, municipal indices, ETFs, as well as alternative markets. E

- Set the markets you would like to appear below the bond you are underwriting. F
- Key in a security's identifier (CUSIP, Equity, Index, ETF, Treasury, etc.) and hit ENTER.
- Select the relevant security from the list of results. Click the Add Instrument button for the relevant section you want to add it to.
- Remove a market with the X. Click OK to save settings.

6. Broker List: Program contact Broker List buttons within **Markets View** to IB them. G

- Enter the button's label in the first field (e.g., firm initials, contact's initials) and the corresponding Bloomberg email in the second. H
- Click OK to save.

7. Spread Benchmark: Under the **Markets View**, you can view a bond's price, yield and spread (as well as trade activity). Based on your preference, you can set a selected Spread Benchmark J from the following options:

- BVMB* Index (BVAL Municipal AAA benchmark)
- MMAI Index (Municipal Markets Advisors)
- YCGT00* Index (U.S. Treasury Actives Curve)

8. Report *Coming Soon*

> Add up to seven sell-side contacts. Click the other radio button. and add up to three buy-side contacts.