

PURPOSE

Analyze and track specific risk metrics associated with your portfolio or watch list in a simple grid view. Accessible in Portfolio View.

HOW TO USE THIS FEATURE

- Add/remove columns by clicking the Columns button. **A**
- Customize your view by dragging/dropping column headers in your preferred order.
- Stratify your portfolio by grouping criteria. Drag/drop one or more column headers to Portfolio Items Bar. **B**
- Sort columns in ascending/descending order within groupings **C** by clicking on column headers.
- Click on a CUSIP to jump to the **Obligor View** and begin deep dive analysis. **D**
- Toggle to Heatmap, Summary or Scatter Plot Views for further portfolio-level analysis. **E**
- Click the Filters button to drill into credits with specific attributes **F**, e.g., set a minimum and maximum for e.g., Days Cash on Hand. See the Managing Filters User Guide for more details on filters.

QUICK TIPS

Add a Security to the Grid

Click the plus button (not pictured), enter CUSIP and % weight. **A**

Search for a Single Security

Use the Search Bar on the top left to look up a single CUSIP as an alternative to uploading a portfolio. **F**

View Security Master Details

The application offers multiple credit metrics to organize your view by. For full security master details, click the Columns button or see our Data Guide at www.munirisk.com/application-user-guides.

Another Way to Columns Menu

While under the Settings Menu, you'll see an alternate way to access columns visibility for the Grid View.

The screenshot displays the MUNIRISK application interface in the Portfolio View: Grid View. The top navigation bar includes tabs for Portfolio, Obligor, Markets, Peer, and Reports. A search bar is located at the top left. The main content area shows a grid of portfolio items with columns for CUSIP, Position, % Weight, Full Name, Bloomberg Sector, Obligor Name, Next Call Date, Primary State, S&P Rating, BBG Composite Rating, Last Price, Net YTW, Net YTM, Mid Mod. Duration, and Bond Security. A 'Columns' button (A) is in the top right corner. A 'Filters' button (F) is on the far right. A 'Portfolio Columns Visibility' dialog box (A) is open, showing a list of columns with checkboxes for visibility. A 'Views' panel (E) on the left shows 'Grid' selected. A 'Higher Education' section (D) is also visible.