

# DASH <GO>

## DASH for Equity Sales-Traders

DASH for Equity Sales-Traders provides tools to improve client coverage, market liquidity and identify actionable opportunities for sales-traders' clients. By consolidating third-party or proprietary OMS and CRM systems, DASH provides sales-traders with a comprehensive view of their accounts and a view of firm-wide liquidity. DASH's client relevance algorithm will ensure that sales-traders know the right clients to call and when. Backed by Bloomberg's unsurpassed market analytics, workflow efficiency and intuitive UI, DASH is an essential part of a successful sales-trader's workflow.

### What is DASH for Equity Sales-Traders?

DASH empowers sales-traders to improve their client relationships and generate more orders.



#### **DASH Liquidity Aggregation**

View all of your firms real-time liquidity

#### **DASH Time-Based Notifications**

Don't miss the most recent liquidity (IOI, Orders and Traders Markets)

#### **DASH Client Relevance**

Know the right accounts to call for any security

#### **DASH Client Communication**

Communicate to the right accounts using their preferred method

#### **DASH Alerts**

Never miss an opportunity to generate an order

## DASH Liquidity Aggregation

DASH Liquidity Aggregation tools display all of a firm's liquidity in one place, making it easier for sales-traders to identify opportunities and generate more orders. By utilizing flexible permissioning and order-sharing logic, sales-traders can see the information they need while adhering to compliance requirements.

Share and view all of the firm's liquidity – as individual orders or aggregated for insights

Time Ticker	Exc. Source	Qty	Filled	Q. Leaves	Price
10:40:26TSLA	US TEST	7,600	80	7,520	0.00
12:21:04SIRI	US DBSNEW	100	0	100	0.00
12:20:26SIRI	US DBSNEW	100	0	100	0.00
11:57:39WMT	US INSTI	10,000	0	10,000	89.46
14:33:59HAL	UN FIDELITY	2,000	500	1,500	81.44
07:01:47FB	US DBSNEW	100	0	100	0.00
12:45:47INTC	US DBSNEW	100	0	100	0.00

Ticker	Exchange	Buy Skew	Buy Shares	Sell Shares	Total Sh.	%	Volume	USD Buy V.	USD Sell V.	USD Total V.	Buy Orders	Sell Orders	Total Orders
APD	US	--	0	1,000,000	1,000,000	99.1	163.2M	163.2M	0	163.2M	1	1	2
HAT	US	100.0	1,000,000	0	1,000,000	50.8	15.3M	0	15.3M	15.3M	1	0	1
KORS	US	--	0	1,000,000	1,000,000	61.7	71.2M	71.2M	0	71.2M	1	1	2
PWR	US	78.7	250,000	67,500	317,500	27.3	8.5M	2.3M	10.8M	13.1M	1	1	2

GICS	B. Skew	B. Value	S. Value	T. Value	N. Value	HF Skew	B. Orders	S. Orders	T. Orders
US		366.7M	742.3M	1.1B	-435.6M		30	52	82
Consumer Discretionary	61.3	155.7M	117.0M	302.7M	68.7M		1	14	15
Materials	0.3	549.7K	172.9M	173.4M	-172.3M		1	2	3
Industrials	15.4	21.4M	94.7M	116.1M	-73.4M		9	9	18
Utilities	33.6	35.9M	70.3M	106.2M	-34.3M		2	3	5
Information Technology	--	0	102.1M	102.1M	-102.1M		0	7	7
XDRs	--	0	90.8M	90.8M	-90.8M		1	2	3
Real Estate	18.5	13.1M	57.6M	70.6M	-44.5M		1	2	3
Health Care	75.4	42.4M	13.8M	56.2M	28.6M		2	2	4
Energy	--	0	19.2M	19.2M	-19.2M		0	2	2

Time	Security	Side	Filled Val.	Filled %	Avg Px	% Chg	Limit Px	OrderQ	FilledQ	LeavesQ	Acci
15:24:55	REEM LN Equity	BUY	0	--	0.00	-5.7	0.14	10,000	0	10,000	OFID
15:24:06	GLEN LN Equity	BUY	0	--	0.00	-5.7	0.00	1,000	0	1,000	OFID
14:35:03	MHK US Equity	BUY	0	100.0	0.00	1.6	181.86	90,000	90,000	0	OFID
14:34:59	MHM US Equity	BUY	0	100.0	0.00	-2.2	0.00	90,000	90,000	0	OFID
14:34:55	MWRK US Equity	BUY	0	25.0	0.00	-1.7	55.90	10,000	2,500	7,500	OFID
14:34:52	MAAT US Equity	BUY	0	100.0	0.00	-1.6	0.00	1,000,000	1,000,000	0	OFID
14:34:49	KLAC US Equity	SSL	0	100.0	0.00	-2.1	0.00	20,000	20,000	0	OFID
14:34:47	PWR US Equity	BUY	0	100.0	0.00	-0.4	0.00	250,000	250,000	0	OFID

- View all firms, orders on one screen
- Enrich orders with Bloomberg's real-time market data
- View a firm's participation rates in the securities it is active in
- Choose from several different options for sharing orders within the firm
- Sales-traders can share only the orders they choose using configurable automation or full control

- View orders aggregated by sector
- Identify the types of accounts moving each sector
- View cash and electronic flow aggregations in one place

## DASH Time-Based Notifications

Score	Security	Filter	Security	Sector or Text
	IBM US		14:05	AEHRlich IOI: PFE US BUY 25k Nat
	AMZN US		14:04	FIDELITY INFY US BUY 50k MKT (Lvs 50k)
	PFE US			[IOI: INFY US BUY 30k ]
	INFY US		13:34	AEHRlich Information Technology We are seeing Hedge fund buyers this afternoon across the board.
				FB I can offer 100k inline to a natural AKAM I have 2 buyers picking proces but will cross 100K for a natural
			11:13	INSTI AMZN US SELL 11k \$1886.75 (Lvs 11k)
			11:05	INSTI PFE US SELL 11k \$41.03 (Lvs 11k)
				Release: PFE US SELL 11k \$41.03 (Lvs 11k)
			11:03	JDIMUZIO IOI: IBM US BUY 100k Nat
			11:02	JDIMUZIO IOI: IBM US BUY 100k Nat
			10:44	INSTI AMZN US SELL 100k \$1882.12 (Lvs 100k)
				Release: AMZN US SELL 100k \$1882.12 (Lvs 100k)
			10:44	INSTI AMZN US BUY 500k \$1883 (Lvs 500k)
				Release: AMZN US BUY 500k \$1883 (Lvs 500k) hey guys i have more to offer

- View all liquidity in one place (Natural IOIs, Orders and Trader Markets)
- Time ordered notifications of new liquidity
- Add comments to orders
- View which securities have liquidity most relevant to your accounts

## DASH Client Relevance

DASH utilizes a relevance algorithm to analyze client orders and market information, helping sales-traders identify the ideas most relevant to their clients and prioritize who to call first in every situation.

### DASH relevance algorithm identifies the best accounts to share an order or market event with

Account	Score	Shares Traded	Position	Change	RIF % of Por	List	Note
FIDELITY		+546.5k / -5.8M	3.97M	+1.27M	431		
VANGUARD		+310k /	67.12M	+1.78M	53	0.2	
INSTI		+1.9M / -45.4k	23.90k	+2.60k	84		
BLACKROCK		+225k /	59.57M	-305.62k	48	0.3	
AXA		+64k / -450.2k	259.10k				
PerIman Capital			3.23M	+1.30M	443		
JANUS		+37.5k /	400.00	-42.00			
NOMURA		+50k /	195.75k	+8.91k	692		
NIKKO ASSET MAN.		+25k /	192.24k		443		
WELLINGTON MANA..			4.64M	-2.97M	352	0.1	
APOLLO		/ -10k					
f			72.33k	+40.62k	68	0.3	
PIONEER		+66k /					
SCOTIA			164.75k	+2.55k	62	0.3	
T ROWE PRICE		+10k /					
RCB7			1.19M	+172.14k	62	0.4	
HEX			1.49M	+5.31k	607		

Account/Security	Time	Buys	Sells	Volume	Last Price	%Chg	Score	I	OH	H	I	N
FIDELITY (2)												
AMZN US	11:13	500k	111k	6.03M	1.88k	-2.07%			OH	H	I	N
PFE US	11:05	--	11k	12.41M	41.18	+1.15%			OH	H	I	
BLACKROCK (3)									OH	H		
AMZN US	11:13	500k	111k	6.03M	1.88k	-2.07%			OH	H		
PFE US	11:05	--	11k	12.41M	41.18	+1.15%			OH	H		
INCY US	14:04	50k	--	1.79M	20.84	-0.31%			OH	H		
VANGUARD (3)									OH	H	I	
JANUS (3)									OH	H		
SCOTIA (2)									OH	H		
AXA (2)									OH	H		
RCB7 (3)									OH	H	I	
NIKYO ASSET MAN. (3)									OH	H	I	
HEX (3)									OH	H		
WELLINGTON MANAGEMEN (3)									OH	H		
PerIman Capital (3)									OH	H		
123TEST (2)									OH	H		
NOMURA (2)									OH	H		

In DASH, sales-traders can view:

- List of accounts to call sorted by relevance to the security
- Relevance to companies in the sector using the Sector Exposure tab
- Accounts relevant to any multi-security monitor (i.e., Volume Skew & Market Buzz)
- All accounts information on one screen
- 12-month order history, holdings, interest lists, Notes, MSG and IB
- CRM-inputted notes
- Prioritized list of accounts or securities with the most order opportunities
- The orders that matter most to an account

## DASH Client Communications

DASH allows you to quickly target your liquidity by consolidating communication to several accounts in one click.

**DASH Communication Manager**

Recipients: <Add Recipients>, Clear All, Messages to external users are blocked, ANDREW BECK++, JEREMY PAPA, LISA MCGOWAN, PETER MEDDEMM, MICHAEL CIOFFI, WENDY LAM, NIC TSE, DASH Contacts

Message Content: Subject, Attached: No News stories attached, Normal, {PFE US Equity}

Live IOIs:

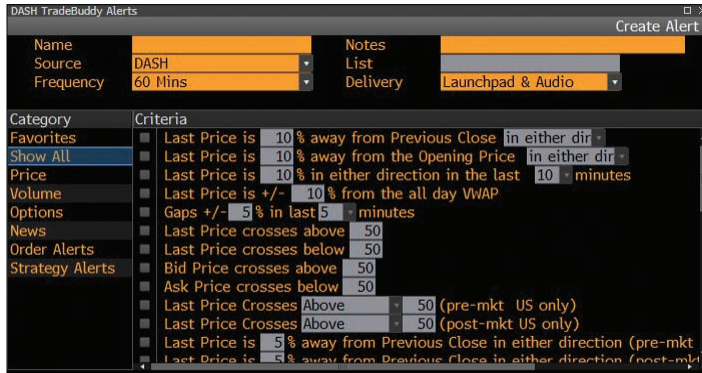
Time	Side	Ticker	Size	Price	Natural
14:05:03	BUY	PFE UN	25,000	0	Y

Send

- Automatically use all of the client's preferred method of communication (IB, PCHAT, MSG)
- Quickly add Open Natural IOIs to your communication
- Automatically target just the accounts that are relevant

## DASH Alerts

DASH monitors the markets to ensure that the sales-trader does not miss important events in securities they are trading or have recently traded. Real-time alerts present opportunities to improve trade performance, increase crossing rates and retrieve recently unfinished orders.



- Identify unusual activity in the market and improve trade performance
- Create alerts to monitor the market and execution performance, ensuring the trader is alerted to anything unusual
- Automatically set alerts on open orders such as option activity, price moves, volume spikes or benchmark deviation



- Set alerts to never miss a cross opportunity with another sales-trader's order
- Sales-traders receive real-time alerts when a colleague receives an order in a security that their client has traded recently, is a holder of, is on a focus list or for which a note was entered
- Create an alert when an unfinished order from up to a month ago comes back to the price the client desires
- Receive real-time cross alerts

### Take the next step.

For additional information, press the <HELP> key twice on the Bloomberg Terminal®.

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