

Executive Dashboards - WealthTrends - Quarterly Growth Rates - Customers

Provides key measures to evaluate the economic and financial wellbeing of the neighbourhoods where customers tend to live. This customer weighted report also contains data visualization that are provided to better illustrate key economic and financial trends for Savings, Investments, Real Estate values and Consumer Debt.

WealthTrends | Quarterly Growth Rates

ENVIRONICS
ANALYTICS

Customers: MobileScapes Extract - Visitors CEL: Unique visitors

The customer file name is at the top of the report.

AVERAGE VALUES AND GROWTH RATES PER HOUSEHOLD

	2019 Q4	2020 Q1	2020 Q2	% Growth: Q4 to Q1	% Growth: Q1 to Q2
WealthScapes Totals					
WealthTrends Net Worth - Value					
WealthTrends Assets - Value					
WealthTrends Liquid Assets - Balance					
WealthTrends Debt - Balance					
Assets - Savings					
Total Savings - Balance					
Chequing & Savings Accounts - Balance					
GICs and Term Deposits - Balance					
Assets - Investments					
Total Investments - Balance					
Stocks - Balance	\$60,345	\$45,631	\$54,444	-24.4	19.3
Bonds - Balance	\$4,888	\$4,896	\$4,907	0.2	0.2
Investment Funds - Balance	\$121,254	\$107,767	\$117,951	-11.1	9.5
Assets - Real Estate					
Total Real Estate - Value	\$822,330	\$846,370	\$881,058	2.9	4.1
Net Real Estate Equity - Value	\$571,730	\$587,135	\$614,116	2.7	4.6
Primary Real Estate - Value	\$661,241	\$680,425	\$708,187	2.9	4.1
Other Real Estate - Value	\$161,089	\$165,945	\$172,871	3.0	4.2
Debt					
Mortgage - Balance	\$250,600	\$259,235	\$266,941	3.4	3.0
Total Consumer Debt - Balance	\$73,369	\$72,526	\$69,617	-1.1	-4.0
Credit Card Debt - Balance	\$10,323	\$10,047	\$8,582	-2.7	-14.6
Personal Loans - Balance	\$33,440	\$31,997	\$31,393	-4.3	-1.9
Lines of Credit - Balance	\$29,605	\$30,482	\$29,642	3.0	-2.8

Here, the average balance in Bond investments for the neighbourhoods where these customers tend to live is **\$4,888** for the last quarter (Q4) of 2019. In these same neighbourhoods we see a small increase in the average balance of **\$4,896** in the first quarter of 2020 (Q1) and a further increase to **\$4,907** in the second quarter (Q2) of 2020. These changes are also reflected in the % Growth values included in this report. A % Growth Value of **0.2%** between 2019 Q4 and 2020 Q1 indicates that balances held in Bonds for the neighbourhoods where these customer live had increased. Between the first two quarters of 2020, the % Growth Value of **0.2%** indicates that these neighbourhoods showed another small increase in their average bond balance.

Quarter (e.g. 2019 Q4): The value or balance in dollars per household in the customer neighbourhoods for the variable during a quarterly period.

% Growth (e.g. % Growth Q4 to Q1): Provides a measure for comparing values between quarters, while also describing economic and financial growth patterns for households in the customer file.

Note: Users have the ability to view tabular format and download the raw data for the tables.

% Growth Legend: < 0% > 0%

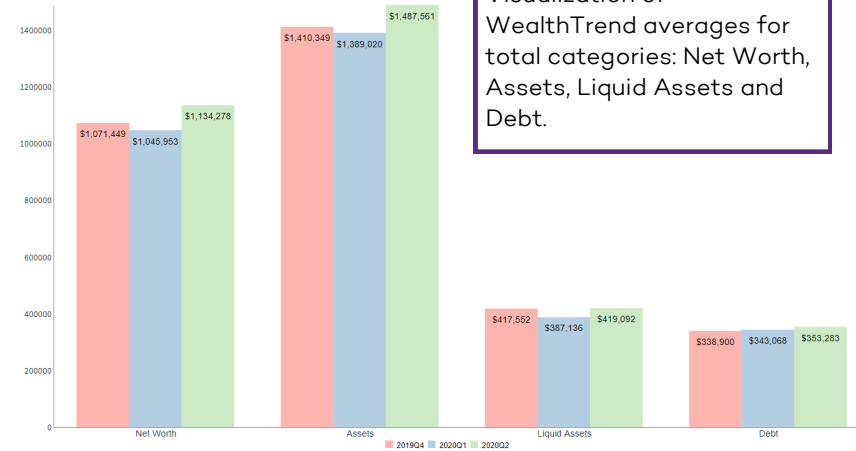
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WealthTrends | Totals

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WEALTHTRENDS AVERAGES PER HOUSEHOLD

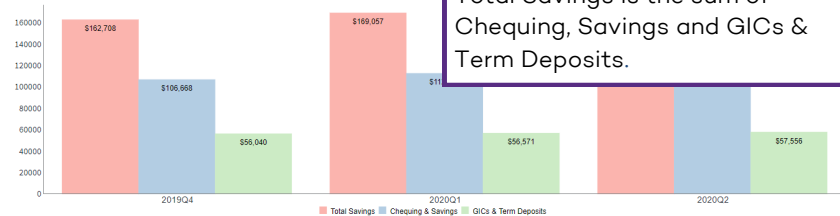


Visualization of WealthTrend averages for total categories: Net Worth, Assets, Liquid Assets and Debt.

Note: Change to tabular format by scrolling over the graph and clicking the spreadsheet icon, in the top right corner of the graph. Once in tabular format, download the data by scrolling over the table and clicking the Excel icon, that appears in the top right corner of the table. Return to the graph by clicking on the spreadsheet icon.

Customers: MobileScapes Extract - Visitors CEL: Unique visitors

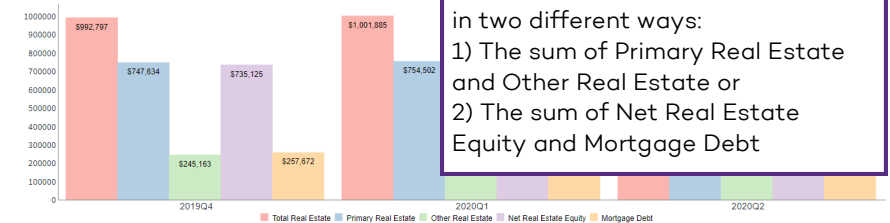
SAVINGS PER HOUSEHOLD



Total Savings is the sum of Chequing, Savings and GICs & Term Deposits.

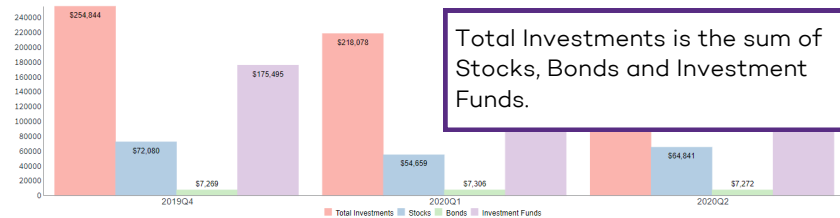
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REAL ESTATE VALUES PER HOUSEHOLD



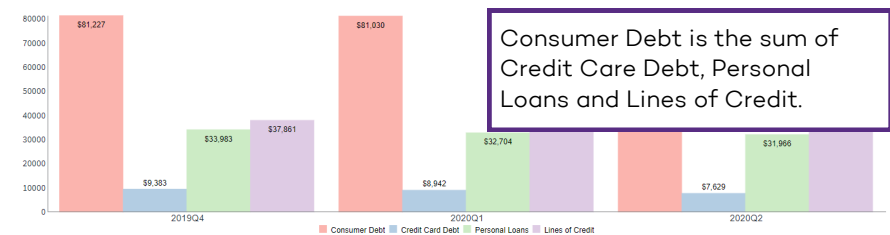
Total Real Estate can be broken down in two different ways:
 1) The sum of Primary Real Estate and Other Real Estate or
 2) The sum of Net Real Estate Equity and Mortgage Debt

INVESTMENTS PER HOUSEHOLD



Total Investments is the sum of Stocks, Bonds and Investment Funds.

CONSUMER DEBT PER HOUSEHOLD



Consumer Debt is the sum of Credit Card Debt, Personal Loans and Lines of Credit.