

Executive Dashboard - Financial - WealthTrends (Customers)

Provides key measures to evaluate the economic and financial wellbeing of the neighbourhoods where customers 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



Customers: Sample_Customer_File: Record Count

The customer file used for report.

AVERAGE VALUES AND GROWTH RATES PER HOUSEHOLD

| | 2020 Q4 | 2021 Q1 | % Growth: Q4 to Q1 |
|---------------------------------------|-----------|-----------|--------------------|
| WealthScapes Totals | | | |
| WealthTrends Net Worth - Value | \$522,755 | \$609,072 | 16.5 |
| WealthTrends Assets - Value | \$705,747 | \$793,664 | 12.5 |
| WealthTrends Debt - Balance | \$182,992 | \$184,592 | 0.9 |
| Assets - Savings | | | |
| Total Savings - Balance | \$90,125 | \$90,000 | -0.1 |
| Chequing & Savings Accounts - Balance | \$54,969 | \$55,833 | 1.6 |
| GICs and Term Deposits - Balance | \$35,157 | \$34,167 | -2.8 |
| Assets - Investments | | | |
| Total Investments - Balance | \$139,998 | \$143,989 | 2.9 |
| Stocks - Balance | \$33,619 | \$33,888 | 0.8 |
| Bonds - Balance | \$6,788 | \$6,505 | -4.2 |
| Investment Funds - Balance | \$99,591 | \$103,597 | 4.0 |
| Assets - Unlisted Shares | | | |
| Unlisted Shares - Balance | | \$17,975 | 6.7 |
| Assets - Real Estate | | | |
| Total Real Estate - Value | | \$541,699 | 18.1 |
| Primary Real Estate - Value | | \$440,010 | 18.0 |
| Other Real Estate - Value | \$85,914 | \$101,689 | 18.4 |
| Net Real Estate Equity - Value | \$333,713 | \$413,930 | 24.0 |
| Debt | | | |
| Mortgage - Balance | \$125,059 | \$127,769 | 2.2 |
| Total Consumer Debt - Balance | \$57,933 | \$56,822 | -1.9 |
| | | | -6.8 |
| | | | -0.7 |
| | | | -1.0 |

The average balance for total investments for the neighbourhoods where these customers tend to live is **\$139,998** for the last quarter of 2020 (2020 Q4). In these same neighbourhoods we see a **2.9%** increase from 2020 Q4 to 2021 Q1 bringing the average balance for investments funds to **\$143,989**.

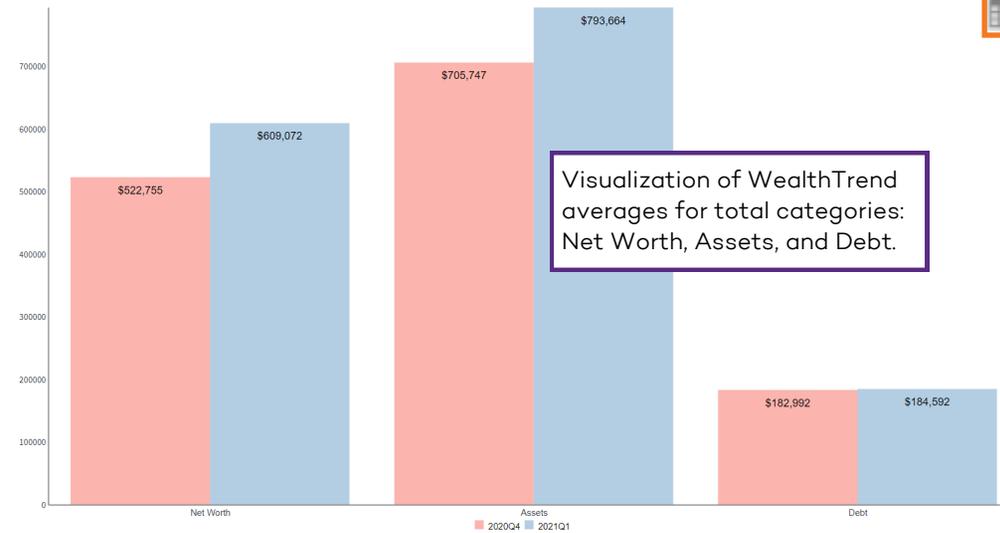
Quarter (e.g. 2020 Q4): The value or balance in dollars per household in the customer neighbourhoods for the variable during a quarterly period.
% Growth (e.g. % Growth Q4 to Q1): Provides a measure for comparing values between quarters, while also describing economic and financial growth patterns for households in the customer file.

% Growth Legend: < 0% > 0%

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WEALTHTRENDS AVERAGES PER HOUSEHOLD

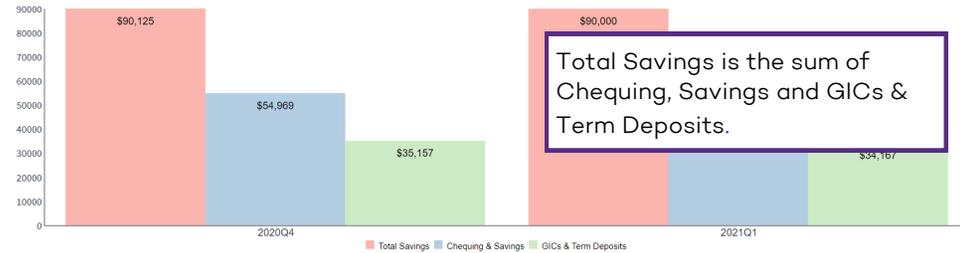


Visualization of WealthTrend averages for total categories: Net Worth, Assets, and Debt.



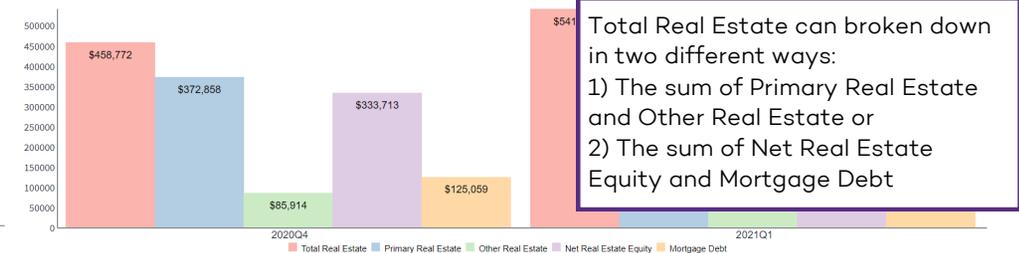
Note: Change to tabular format by scrolling over the graph and clicking the spreadsheet icon in the top right corner. Once in tabular format, download the data by scrolling over the table and clicking the Excel icon, , that appears in the top right corner of the table. Return to the graph by clicking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

SAVINGS PER HOUSEHOLD



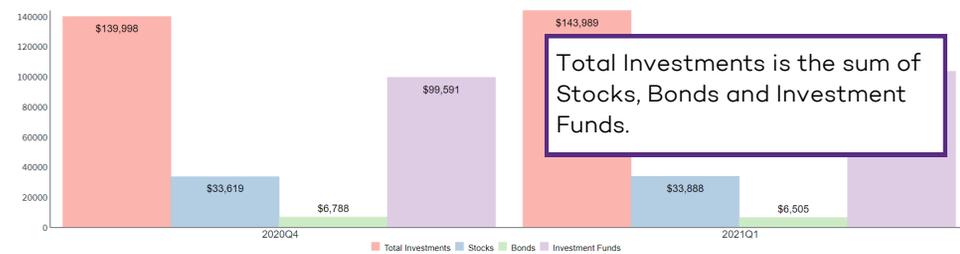
Total Savings is the sum of Chequing, Savings and GICs & Term Deposits.

REAL ESTATE VALUES PER HOUSEHOLD



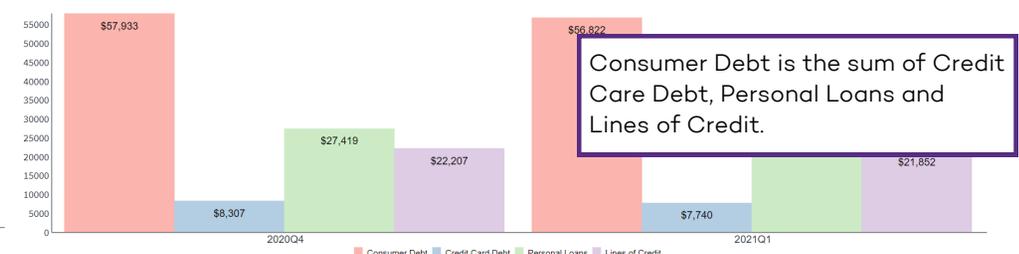
Total Real Estate can be broken down in two different ways:
 1) The sum of Primary Real Estate and Other Real Estate or
 2) The sum of Net Real Estate Equity and Mortgage Debt

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.