# Summary Page Changes / Fixes

## Share Distribution

**Bugs**

1. No maximum date on the date selection

**Potential Changes**

Include a how to section under the graphs to tell users they can interact with each pie chart

“

**Interactive Chart Guide**

1. **Changing Dates:** The date change be changed to reflect the distributions of share in the past
2. **View Data**: Hover over any segment of the pie chart to see more detailed information about that segment.
3. **Legend Interaction**: You can also select or deselect data categories directly from the legend to remove / return the information to the chart.
4. **Chart Interaction:** The charts have the following interactive features
   1. **Download:** Charts can be downloaded as a .png file

“

**Chart Testing**

Testing is done to make sure percentages change as required but the number of shares do not. Also tested that selecting and unselecting different options in the key removes / returns information to the chart.

1. *Shares Distribution by Sponsor Type*: Interactive chart works
2. *Shares Distribution by Holder Type:* Interactive chart works
3. *Shares Distribution by Retail vs Institutional:* Interactive chart works

## Top Buyers & Sellers By Total Volume Traded

**Bugs**

1. Start Date Incl. (Min: Jan-31-2025) : Why can the start date not be before 31/1/25
   1. This does not change even if I change the end date
   2. Is there a specific range that this must be?

**Potential Changes**

Make Chart titles “Top 5 Buyers” & “Top 5 Sellers

Include a how to section under the graphs to tell users they can interact with each bar chart and how to use the dates

“

**Interactive Chart Guide**

1. **Changing Dates:** The dates can be changed to reflect volume traded over the set period. Use the date picker tool to select the start and end dates to adjust the data displayed within that range.
2. **View Data:** Hover over any bar in the chart to see more detailed information about that data point.
3. **Legend Interaction:** You can select or deselect data categories directly from the legend to add or remove information from the chart. Click on the names or the colour squares next to the names to customise your view.
4. **Chart Interaction:** The charts have the following interactive features
   1. **Download:** Charts can be downloaded as a .png file
   2. **Zoom:** Mouse can be used to zoom in or out of the chart using a box
   3. **Pan:** Mouse can be used to move across the chart
   4. **Zoom in**
   5. **Zoom out**
   6. **Autoscale:** Will automatically rescale the chart to fit the space
   7. **Reset Axes:** Will reset the size of the chart to standard

“

**Chart Testing**

Testing done to make sure that the percentage changes, but the information does not for each bar. Also tested that selecting and unselecting different options in the key removes / returns information to the chart. Checked to make sure interactive tools worked

1. *Buyers Top 5*: Interactive chart works
2. *Sellers Top 5:* Interactive chart works

**Questions**

1. What is the point of the **box select** function or **lasso** function

## Top Buyers & Sellers By Net Holding Changed

**Bugs**

1. Start Date Incl. (Min: Jan-31-2025) : Why can the start date not be before 31/1/25
   1. This does not change even if I change the end date
   2. Is there a specific range that this must be?
2. Naming – Should say “Top Buyers and Sellers By Net Holdings Changed” (remove the “)” )

**Potential Changes**

Include a how to section under the graphs to tell users they can interact with each bar chart and how to use the dates

“

**Interactive Chart Guide**

1. **Changing Dates:** The dates can be changed to reflect volume traded over the set period. Use the date picker tool to select the start and end dates to adjust the data displayed within that range.
2. **View Data:** Hover over any bar in the chart to see more detailed information about that data point.
3. **Chart Interaction:** The charts have the following interactive features
   1. **Download:** Charts can be downloaded as a .png file
   2. **Zoom:** Mouse can be used to zoom in or out of the chart using a box
   3. **Pan:** Mouse can be used to move across the chart
   4. **Zoom in**
   5. **Zoom out**
   6. **Autoscale:** Will automatically rescale the chart to fit the space
   7. **Reset Axes:** Will reset the size of the chart to standard

“

**Chart Testing**

Testing done to make sure the that the information shows when hovered over by the mouse. Also checked to make sure interactive tools work

1. *Top Shareholders – Net Holdings Increase*: Interactive chart works
2. *Top Shareholders – Net Holdings Decrease:* Interactive chart works

## Geospatial Distribution of Shareholders

**Bugs**

1. No maximum date on the date selection

**Potential Changes**

Potentially move the about / guide section to below the map

Include a how to section under the graphs to tell users they can interact with each bar chart and how to use the dates

“

**Heat Map Guide**

1. **Changing Intensity:** The colours on the map change to reflect the intensity of holdings across different locations in Australia. The colour bar at the top right corner shows the intensity values in millions, ranging from blue (lower intensity) to red (higher intensity).
2. **View Data:** Hover over any area of the heat map to see detailed information about the intensity of holdings at specific locations.
   * **Legend:** The colour bar helps interpret the intensity values shown on the map.

**Circle Map Guide**

1. **Changing Locations**: Locations and amounts of holdings are indicated on the map, with colours representing different types of shareholders. The legend in the top right corner provides colour coding details.
2. **View Data:** Hover over any circle to view specific details about the holdings, including shareholder type and total amount.

* **Circle Size:** The size of each circle is proportional to the total amount of holdings.

**Map Interaction:** Both maps have the following interactive features

* **Zoom:** Use the + and - buttons to adjust your view.
* **Pan:** Click and drag to explore different areas.
* **Full-Screen:** Use the full-screen button in the bottom left corner for better visibility.

**Geospatial Data Source:** Based on Australian Bureau of Statistics (<https://www.abs.gov.au/statistics/standards>).

**Privacy Note:** For privacy protection, locations are shown at the suburb level only, with precise locations randomized within each suburb.

“

**Chart Testing**

Testing done to make sure the that the information shows on the map correctly and the circle map correctly shows the investor information when hovered over. Maps where also checked to ensure that the zoom function was working and the full screen

1. *Heat Map*: Interactive map works
2. *Circle Map:* Interactive map works

## Daily Movement by Broker

**Bugs**

1. Date format different for buy and sell table

**Potential Changes**

Change Units bought / Sold – “Shares Bought / Sold”

**Section Testing**

Testing done to make sure tables are clear, formatting is consistent and user controlled changes to the page are working. The date was also changed to ensure this functionality was operating

# Broker Activity Changes / Fixes

## Broker / Sponsor Ranking by Sponsored Holdings

**Bugs**

1. should the date be in the format DD/MM/YYYY

**Potential Changes**

Similar to other sections, propose to but an instruction section on how to use the interactive part of the bar chart

1. **Changing Dates:** The dates can be changed to reflect the holdings on any particular day
2. **View Data:** Hover over any bar in the chart to see more detailed information about that data point.
3. **Legend Interaction:** You can select or deselect data categories directly from the legend to add or remove information from the chart. Click on the names or the colour squares next to the names to customise your view.
4. **Chart Interaction:** The charts have the following interactive features
   1. **Download:** Charts can be downloaded as a .png file
   2. **Zoom:** Mouse can be used to zoom in or out of the chart using a box
   3. **Pan:** Mouse can be used to move across the chart
   4. **Zoom in**
   5. **Zoom out**
   6. **Autoscale:** Will automatically rescale the chart to fit the space
   7. **Reset Axes:** Will reset the size of the chart to standard

**Section Testing**

Testing done to make sure the bar chart was clear, and the interactive parts of it worked as expected. Also tested the data function to ensure it changes the display

## Account Management By Broker

**Bugs**

1. should the date be in the format DD/MM/YYYY

**Potential Changes**

When I hover over a holding, should it have the name of the holding and the amount instead of “closing balance” then the amount

When I hover over a section, should it show percentage (i.e Unknown is like ~80%)

Similar to other sections, propose to but an instruction section on how to use the interactive part of the bar chart

1. **Changing Dates:** The dates can be changed to reflect the holdings on any particular day

**Section Testing**

Testing done to make sure the heat map was clear and the information presented was the same when hovering over a box. Checked the date function is changing the information accordingly

## Shareholder Data Page

### Shareholder List

|  |  |  |
| --- | --- | --- |
| **Section Testing**  Testing carried out to show that; | **Outcome** | **Explanation** |
| 1. When shareholder data is selected using the display button, the correct information is displayed in the Holding Trend & Holding Statistics sections  - button can be also used to remove shareholder information from display | Passed | N/A |
| 2. Changes to the start and end date are in the correct format and can be changed to reflect changings in holdings across those periods | Passed | Change in date did not change the holdings sold  - Shareholder Ms Narelle Edmunds used, her holdings did not change when date was changed to 2/2/2025-3/2/2025 |
| 3. Changes to the Rows per page correctly changes the number of rows of information shown in the table without expanding the table (allows user to scroll through instead) | Passed | The table takes along time to load |
| 4. Information correctly shows for both Holding Statistics & Holding Trend no matter how many rows of information gets added | Passed | N/A |

### Holding Trend by Broker

|  |  |  |
| --- | --- | --- |
| **Section Testing**  Testing carried out to show that; | **Outcome** | **Explanation** |
| 1. About section correctly displays | Passed | N/A |
| 2. Graph information can correctly be displayed by selecting and unselecting information from the brokers list to the right | Passed | N/A |
| 3. Display can be zoomed in on, period of time changes using both buttons in top left or the slider on the bottom of the graph | Passed | N/A |
| 4.Using the functions in the graph works correctly including;  - Download  - Zoom  - Pan  - Box Select  - Lasso  - Zoom + / -  - Autoscale  - Home  - Full Screen | Passed | N/A |

**Potential Changes**

Revised about section with spelling updates

“

Broker Filter

• All brokers are unselected by default.

• Select target broker(s) using broker filter on the right side.

• Click brokers to select or double click to unselect.

Timeframe

• Timeframes are applied on whole period by default.

• Clicked and drag bars of timeframe panel at the bottom.

• The timeframe can shift leftwards or rightwards.

• There are also time options on top left corner.

“

### Geospatial Analysis of Holding Variations Per Customer By Broker

|  |  |  |
| --- | --- | --- |
| **Section Testing**  Testing carried out to show that; | **Outcome** | **Explanation** |
| 1. About section correctly displays | Passed | N/A |
| 2. Changes to the start and end date change the information displayed | Passed | N/A |
| 3. Select shareholder type(s) correctly changes the broker names that can be selected | Passed | N/A |
| 4.Dark Theme, street view and light theme all work | Passed |  |
| 5. Selecting different brokers correctly changes the information displayed | Passed | N/A |

**Potential Changes**

Revised about section with spelling updates

“

• Each bubble represents holdings associated with specific broker.

• Circle size is proportional to the amount of changed holdings.

• For privacy protection, shareholder locations are shown at suburb level only, with precise locations randomised within each suburb.

• Foreigner Shareholder is not shown now but will be shown in the future.

• On right-hand side of map, select or deselect brokers by checking/unchecking the boxes next to their names.

• Use the “Filter” button to fold and unfold filter panel.

• Use the “Check All” button to include all brokers and “Uncheck All” button to exclude all brokers.

• Zoom In/Out: Use the + and - buttons on the left of the map.

• Drag to Move: Click and hold to move the map across different regions.

• Use the full-screen button (bottom-left corner) to enlarge the map for better viewing.

• Identify shareholder and holdings change with colour.

Light Green:

• Represents new accounts.

• Indicates that a shareholder has newly joined or started holdings in a location.

Dark Green:

• Represents an increase in shareholding for an existing account.

• The darker shade emphasizes the growth in shares.

Orange:

• Represents a partial sell-off of shares.

• Indicates that a shareholder has reduced some, but not all, of their holdings.

Red:

• Represents a complete sell-off of shares.

• This dark shade signals that the shareholder has sold all holdings in a location.

Blue:

• Represents no change in holdings.

• This neutral colour is used for accounts where the balance remains unchanged.

Geospatial data is based on Australian Bureau of Statistics <https://www.abs.gov.au/statistics/standards>

“

### Shareholder List: Random Data Checking

|  |  |
| --- | --- |
| **Shareholder Name** | **Information Match for Date Range** |
| Ms Narelle Edmunds | Passed |
| BHP Paribas Nominees | Passed |
| HSBC Custody Nominees | Passed |
| Finclear Services PTY | Passed |
| Rope Communications PTY LTD | Passed |
| Dentian PTY LTD | Passed |
| FNZ Nominee PTY | Passed |
| DJS Holdings | Passed |

### Account Management by Broker: Random Date Check

This check looked at the heat map, holding trend by broker and geospatial analysis of holding variations per customer by broker

|  |  |  |
| --- | --- | --- |
| **Shareholder Name** | **Date Tested** | **Information Match for Date Range** |
| Pebadore PTY LTD | 31/1/2025 | Passed |
| HSBC | 5/2/2025 | Passed |
| Paterson Securities Limited | 6/2/2025 | Passed |
| State one Stockbroking | 7/2/2025 | Passed |
| Morgan Stanley Smith Barney Australia | 10/2/2025 | Passed |
| Bell Potter | 15/2/2025 | Passed |
| Australian Investment Exchange limited | 17/2/2025 | Passed |
| BHP Paribas securities | 24/2/2025 | Passed |