

Title: HU_DSB_29 - Investment Home

Description:

As an internet user,

I want to access Investment Dashboards from Iperon's transparency portals,

So that I can have the most up-to-date macro view of the Investment Portfolio Performance.

Acceptance Criteria:

CA – 01: Screen Structure

- The screen should be named **Investment Portfolio Performance** and display the title at the top left (highlighted).
- Below the title, there should be 7 sets of charts in the shape of a "Control Tower" — meaning the entire screen should be filled with charts, following a priority order for display.
- The **first** chart will be the Financial Evolution Chart of the Pension Fund, as specified in acceptance criterion (CA) 02.
- The **second** chart will be the Monthly Financial Evolution Chart, as specified in acceptance criterion (CA) 03.
- The **third** chart will be the Assets by Class chart, as specified in CA-04.
- The **fourth** chart will be the Portfolio vs. Indicators - Comparison chart, as specified in acceptance criterion CA-05.
- The **fifth** chart will be the Portfolio vs. Indicators - Last 12 months, as specified in acceptance criterion CA-06.
- The **sixth** chart will be the Accumulated Return Comparison chart, as specified in acceptance criterion CA-07.
- The **seventh** chart will be the Historical Return and Actuarial Target chart, as specified in acceptance criterion CA-08.
- The header of the screen should follow the established standard and allow navigation to other specific dashboards within the investment sector.
- The header should contain an icon to navigate to dashboards from other sectors, such as Financial and Auditing.

CA – 02: Financial Evolution of the Pension Fund Chart

- The chart should be a vertical bar chart.
- It should use Iperon's colors.
- It should display the updated data for the Financial Evolution of the Pension Fund.
- The specific requirements for the chart are in accordance with its corresponding User Story, identified as HSU_DSB_30.
- The chart should be displayed at the top left, just below the page title.

CA – 03: Monthly Financial Evolution Chart

- The chart should be a vertical bar chart.
- It should use Iperon's colors.
- It should display the updated data for the Monthly Financial Evolution.
- The specific requirements for the chart are in accordance with its corresponding User Story, identified as HSU_DSB_31.
- The chart should be displayed just below the Financial Evolution of the Pension Fund chart.

CA – 04: Assets by Class

- Three pie charts should be displayed.
- The first chart, the largest, should show the total view of Assets by Class and include Iperon's logo in the center.
- The second chart, below the first one and positioned to the left, should display the Fixed Income data view.
- The third chart, below the first one and positioned to the right, should display the Variable Income and Other data views.
- The specific requirements for the charts are in accordance with its corresponding User Story, identified as HSU_DSB_32.

CA – 05: Portfolio vs. Indicators - Comparison

- Two vertical bar charts should be displayed: one for the current year and the other for the previous year.
- The charts should use Iperon's colors.
- The charts should display the updated data for the Portfolio vs. Indicators - Comparison.
- The specific requirements for the chart are in accordance with its corresponding User Story, identified as HSU_DSB_33.
- The chart should be displayed just below the Monthly Financial Evolution Chart.

CA – 06: Portfolio vs. Indicators - Last 12 months

- The chart should be a vertical bar chart.
- It should use Iperon's colors.
- It should display the updated data for the Portfolio vs. Indicators for the Last 12 months.
- The specific requirements for the chart are in accordance with its corresponding User Story, identified as HSU_DSB_34.
- The chart should be displayed to the right of the Portfolio vs. Indicators - Comparison chart.

CA – 07: Accumulated Return Comparison

- The chart should represent three curves: Portfolio, Target, and CDI.
- It should use Iperon's colors.
- The chart should display the updated data for the Portfolio, Target, and CDI over the years (period).

- The specific requirements for the chart are in accordance with its corresponding User Story, identified as HSU_DSB_35.
- The chart should be displayed below the Portfolio vs. Indicators charts.

CA – 08: Historical Return and Actuarial Target

- Nine horizontal bar charts should be displayed.
- They should use Iperon's colors.
- The charts should display the historical data for return and actuarial target, from the perspective of the Portfolio, Target, and CDI.
- The specific requirements for the charts are in accordance with its corresponding User Story, identified as HSU_DSB_36.
- The chart should be displayed to the right of the Accumulated Return Comparison chart.

Prototypes and Flow Simulations:

<https://dashboard.iperon.ro.gov.br/investimento>

Definition of Done:

- ☐ The "Investment Home" screen is accessible to internet users.
- ☐ The screen has the "Control Tower" structure.
- ☐ The screen contains 7 sets of charts as per the acceptance criteria.
- ☐ The data on the screen is up-to-date and reflects the Investment Portfolio Performance.