| **Category / Topic** | **Business Objective** | **Example Question** |
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| Client Revenue & Time Analysis | Track client-specific revenue trends over time | How has BlackRock’s YTD CV revenue trended across all trading books? |
| Revenue Variance & Trend Analysis | Spot revenue swings for a given client | How did Goldman Sachs’ revenue this week compare to last week? |
| Top Client Identification | Identify top-performing clients | Who are the top 5 revenue-generating clients this year? |
| Client Growth & Performance | Rank clients by growth or decline | Which clients in our portfolio grew their revenues the most this year? |
| Product Revenue & Trading Analysis | Understand client revenue by product line | What are the revenue contributions by product line for Morgan Stanley? |
| Client Classification & Segmentation | Compare performance across client segments | How are Insurance clients performing compared to Asset Managers? |
| Regional Performance Analysis | Compare client performance across geographies | How does JPMorgan’s revenue in the US compare to Europe? |
| Trading Activity & Transactions | Analyze trading size and frequency for clients | Which trades from Citigroup were the largest this month? |
| Executive Reporting & Insights | Summarize client portfolio for leadership | Provide an executive summary of revenue performance for our top 10 clients. |
| Focus List Performance | Track focus list performance vs benchmarks | How is our Corp100 Focus List performing this quarter? |
| Advanced Performance Analytics | Explain growth drivers for specific clients | What factors drove Microsoft’s revenue growth compared to last quarter? |
| Portfolio-Wide Strategic Analysis | Provide big-picture client portfolio view | What are our strategic priorities for the top 20 clients next quarter? |
| Client Coverage & Relationships | Map client coverage across teams | Who covers BlackRock across all business lines? |
| Comparative Analysis Tools | Benchmark performance between clients | How does Goldman Sachs’ revenue compare to Morgan Stanley’s? |
| Client Risk Monitoring | Identify clients at risk of decline | Which clients have shown the steepest revenue declines over the last 6 months? |
| Cross-Segment Analysis | Compare client behavior across products | How does Apple’s revenue split across IB vs Corporate Banking products? |
| Regional Growth Opportunities | Spot fastest-growing client regions | Which APAC clients are driving the strongest growth momentum? |
| Trading Behavior Insights | Understand client trading strategies | How has Tesla’s trading frequency changed compared to last quarter? |
| Coverage Gaps | Detect missing or thin client coverage | Which top-50 clients lack complete sales coverage across regions? |
| Portfolio Concentration | Identify reliance on top clients | What percentage of total revenue is concentrated in our top 10 clients? |