

Business Intelligence Solutions

Big Data

Dashboard Visualization: Enabling Our Client to Present Meaningful Information for Maximum Impact

Who is the Client?

The Client provides an artificial intelligence (AI) platform that matches corporate executives with institutional investors most likely to buy or sell their stock in the next 90 days. Simultaneously, the system offers users data discovery technologies to prepare for corporate-investor access events.

What was the Client's initial problem?

The Client had a portal that did not have meaningful or industry standard dashboards. This prompted the Client to reach out to Data-Core Systems.



Approximately 20 dashboards with over 70 visualizations

What services did Data-Core provide?

Data-Core provided interactive and integrated dashboards that quickly identify themes, trends and outlier data to help investors and corporates efficiently prepare for meetings. The easy to use analytics allow them to immediately compare fundamental, valuation and sentiment factors relative to peers. They can also identify characteristics of investors that are most predictive in signaling they are likely incremental buyers, as well as those characteristics that suggest an investor is at risk of reducing their position.

Easy to use Analytics



What analytical information do the dashboards present?

Investor dashboards provide at-a-glance views of KPIs relevant to a particular company or industry. In real-world terms, "dashboard" is another name for "progress report" or "report", but uses technology to assist in data discovery that is customizable by the user.

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- Peer Ownership Analysis: benchmark owners vs. peers to understand fundamental, valuation and sentiment drivers most impacting investment decisions
- Trend Analysis: investment themes most on investors' minds
- Outlier Analysis: identify the outliers in a company's fundamentals and valuation relative to itself over time, as well as peer group, to best prepare for thoughtful Q&A during investor meetings
- Revisions Analysis: understand how Street expectations are changing relative to your peer group



Implemented in 6 months

In Summary:

Data-Core's simple yet meaningful dashboards were a huge satisfaction to the Client. The project then got promoted to one of the most complicated Dundas BI dashboards in the industry, followed by data migration from MySQL to Data Warehouse and stepping towards Machine Learning. Data-Core's Machine Learning Analytics perfectly complements the services that help corporate executives position themselves in meetings to achieve optimal outcomes. Even though it's at its nascent stage, Data-Core's Machine Learning has an accuracy level being reached that is breaking industry standards.

Machine Learning Analytics with greater accuracy level



*Discover the Data-Core Advantage.
Learn how we can help your company be more relevant, effective and efficient.*



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