Infront Investment Manager Quick Guide

User manual Version 41

Extensive market data on our cloud-based platform

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1 Infront Investment Manager

ee also:		
Belease Notes		
Introduction		
	standard elements	
Working with w		
Widget overvie		
Search		
Screener		
 Further tools in 	the main menu	
 Administration 		
Archive		
 Video tutorials 		
 Downloads 		

2 Introduction

On these help pages, you will learn about the various possibilities that Infront Investment Manager offers.

Infront Investment Manager is a web-based responsive tool supporting the most important current browsers and runs on tablets and smart phones. The workspace consists of configurable dashboards where you can freely add widgets with particular functions and analyses.

The general user interface and navigation of the dashboards is explained first. The Widget Gallery is then used to outline the general structure of the widgets, before the individual functions are presented in the Widget overview chapter.

A separate chapter is dedicated to Screener.

See chapter Administration to learn more about login, system requirements or general profile settings.



3 Navigation and standard elements

In this chapter, the navigation and structure of the graphical user interface is presented in more detail.

See al	50:
	Main menu
	Settings menu
•	Elements in the title bar
•	Dashboards
•	Favourites
•	Context menus
•	Widget Gallery
•	Instrument portraits and PDF instrument profiles
•	Note for new versions
•	Help Center and Infront Investment Manager

3.1 Main menu

Use the main menu icon on the far left of the Infront Investment Manager title bar to open a menu with standard commands.

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arkets Screener Co	mpass Regulatory Prici	ing attrax FONDS/	ADVISOR More 🗸										This dashboard is owned by
Equity	Fixed income	Investment funds	Money ma	ket	Derivatives			Q FULL QUOTE BTC/					22
Europe		Bond funds	FX Cross r		Certificates								
Germany	Government bonds	Equity funds	Money ma		Leverage	. +		CHF 21,628.19	@				
Nordics	Mortgage based	Mixed funds	Treasury			.49		+71.51 +0.33%					
	mortgage based	Mixed fullus	rreasury										
North-America	Sustainability									CHARACTERISTICS			
World								Bid / Ask price	21,616.78 / 21,639.60	FX reverse	0.00004	6 Currency	
								Bid / Ask size				1W perf.	+205.985259 / +0
	Equity							Bid / Ask time	2:03:00 PM / 2:03:00 PM			1M perf.	+5,998.473468 / +38
						.29 .50		Open / Close	21,554.77 / 0.00			6M perf.	-1,416.410116 / -6
						.30		High / Low	21.945.71 / 21.487.74			YTD perf.	+5,998,473468 / +38
BTC/CHF	21,643.12	21,599.88 2	2:04:06 PM	21,599.88				Distance all-time high	65.76%			1Y perf.	-14,772,493971 / -40
BTC/EUR	21,681.25	21,637.93 2	2:04:06 PM	21,637.93				bisance an eme nigh	05.1070			Ti ben	-14,112,4535117 40
ETH/EUR	1,528.61	1,524.03 2	2:04:06 PM	1,524.03									
CHART BTC/CHF SPOT		TO: 2/2/23						VWD PAGES FAVOURI					C SEARCH
BTC/CHF SPOT RATE (CH	HF) (XRATE) — SMA (38)						40k	BCH/EUR Spot rate BCH/USD Spot rate BTC/CHF Spot rate BTC/EUR Spot rate BTC/GBP Spot rate BTC/USD Spot rate	B1 138.65000 13 B1 21599.88000 216 B1 21637.93000 216 B1 19329.65000 193	26.63000 14:04 39.35000 14:04 43.12000 14:04 81.25000 14:04 58.35000 14:04 37.17000 14:04	LINK/EUR Spot rate C LINK/USD Spot rate C LTC/CHF Spot rate Li LTC/EUR Spot rate Li LTC/USD Spot rate Li SUSHI/USD Spot rate	6.63063 7.28788 90.71508 90.83008 99.84209 1.40061	6.65729 14:04 7.31700 14:03 90.93300 14:04 91.10200 14:04 100.00200 14:04 1.40904 14:02
	hang						30k	BTC/USDC Spot rat BTC/USDT Spot rat COMP/USD Spot rat ETH/CHF Spot rate	Image: B 23771.24000 238 Image: B 23773.98000 238 Image: B 23773.98000 238 Image: B 23773.98000 238	18.84000 14:04 12.04000 14:04 56.37935 14:04 25.48000 14:04	UNT/USD Spot rate Un USDC/USD Spot rate U USDT/USD Spot rate T XLM/USD Spot rate St	7.07129 0.99960 0.99720 0.09333	7.11385 14:04 1.00020 14:04 1.00120 14:04 0.09389 14:04

In detail, you can open the following functions by using the commands at the top of the main menu:

Command	Description
attrax fund advisor	Opens the attrax fund advisor in Infront Investment Manager (if you have the corresponding licence). For more information, see attrax fund advisor.

Command	Description
Compass	If the "Compass" function is available to you, select this command to open the page.
Data Manager Compact	Select this command to open the product "Data Manager Compact" (with appropriate permission).
ESG module	Open the ESG module.
GIS Portal	Select this command to switch directly to the GIS Portal (with the corresponding license).
Markets	Closes the menu and returns to the current dashboard in Infront Investment Manager.
Platow Spezial	Opens Platow Spezial in Infront Investment Manager (if you have the corresponding licence). For more information, see Platow Spezial.
Regulatory pricing	Select this command to open the "Regulatory Pricing" module (if you have the appropriate permission).
Screener	Select this command to open the screener in Infront Investment Manager. For more information, see Screener.
Valordata Browser	Opens the Valordata Browser in Infront Investment Manager (if you have the corresponding licence). For more information, see Valordata Browser.
and hold the <ctrl also supported whe</ctrl 	ailable from the main menu support opening pages in a new browser tab. Press > (Windows) or <cmd> (Mac) key while clicking the command. This function is en selecting Favourites or links from context menus. devices such as smartphones, you will also find the main menu icon on the title</cmd>

On smaller output devices such as smartphones, you will also find the main menu icon on the title bar. In this case, the main menu shows all available icons.



Using the (coloured) quicklinks described below, you can also directly open dashboards optimised for the individual asset classes.

See also:

· Quicklinks in the main menu

3.2 Settings menu



Use the settings menu icon on the far right of the Infront Investment Manager title bar to open a menu with standard commands for settings, help and contact.

Command	Description
Contact	Opens the contact form.
Help	This command takes you directly to the Help Center, which opens in a new browser tab. Here you can find the extensive online user documentation for Infront Investment Manager including release notes and various downloads.
Language selection	Select the relevant language type from the drop-down list. For more information, see Language selection.
Log out	Logs out from Infront Investment Manager and closes the work session. For more information, see Log out.

Command	Description
Send feedback	Send us your wishes, ideas and suggestions about Infront Investment Manager. This menu item may be hidden. See also Send feedback.
Settings & profile	Opens the global settings. For example, you can see your profile settings or change the theme of Infront Investment Manager. For more information about the settings, see Settings and profile.
Theme	Use the icons "Dark", "Light" and "Colour Assist" to change the theme of Infront Investment Manager. The second se
User information	At the top of the menu you will find the most important information about the user currently logged in: Name, e-mail address, account ID and realm. You can copy this user information to the clipboard for support purposes, for example. Simply click the user icon:

3.3 Elements in the title bar



Between the main menu icon on the left and the settings menu icon on the right you will find (in the browser version of Infront Investment Manager) further elements in the title bar.



Element	Description
Main menu icon	Use the icon on the left side of the title bar to open the main menu. For more information about the individual functions in the menu, see Main menu.
Quick search	A quick search for securities is available via the "Search" input field. See also the section Search.
Online status indicator	This symbol indicates the status of the connection.
"Reload" icon	Refreshes the display of your Infront Investment Manager.
"Favourites" icon	Use the "Favourites" icon to open the list of favourites. For more information, see Favourites.
"Search" icon	Opens the "Search" field. See also the section Search.
"Alerts" icon	This icon opens the notifications of the triggered alerts in the "Log" view of the "Alert" widget. If there are current alerts, the number of alerts is indicated by the icon. See also the section Alerts.
"Communication Center" icon	In future, you can use this icon to open the "Communication Center", which is not yet available.
"Help" icon ?	Click the "Help" icon to open the Help Center with the online help of your Infront Investment Manager in a new browser tab. In the online help, you find information on how to work efficiently with Infront Investment Manager and details on each widget and the modules. The Help Center also provides comprehensive information about other products such as Infront Portfolio Manager.

Element	Description
Infront logo	On the top right side of the title bar, you see the Infront logo.
	Point to the logo to display the exact version number of the Infront Investment Manager.
Settings menu icon	Use the icon on the right side of the title bar to open the settings menu. For more information about the various commands, see <u>Settings menu</u> .

3.4 Dashboards

The dashboards in Infront Investment Manager allow you to freely arrange up to 50 widgets. You can configure and save your own dashboards. You can share these private dashboards with other users.

You can save changes to your private dashboards and then also compare or revert to older Dashboard versions.

Directly in the main menu, many optimised dashboards are also available to you for quick access by using the so-called quicklinks.

In addition, the Dashboard Explorer also offers some pre-defined standard dashboards.

This chapter covers most of what you need to know about dashboards.

See also: • Elements in the upper dashboard bar • Dashboard Explorer • Open dashboards • Create dashboards

- Edit dashboards
- Copy dashboards
- Share dashboards
- Dashboard properties
- Discard changes in dashboard
- Save dashboards
- Dashboard templates
- Overlay templates
- Dashboard versions
- Delete dashboards

3.4.1 Elements in the upper dashboard bar

In the upper part of the dashboard (below the title bar with the central menu icon), you find the Dashboard Explorer and other basic functions.

MARKETS 🔃 🔹 TEST 🟠 端 MANAGE 🔅

DISCARD SAVE +

The following functions are available from the dashboard bar:

Element	Description
Dashboard Explorer	Use the drop-down list at the top left of the dashboard (next to the title "Markets") to open Dashboard Explorer to select and configure the dashboards.
	In addition, you see the name of the currently selected dashboard. You can edit this name directly here. To do this, click in the field, enter the desired name and confirm the entry with <return>.</return>
	For more information, see Create dashboards, Open dashboards and Edit dashboards.
☆	Click this button to mark the current dashboard as favourites.
"Add to favourites" button	You can then see from the "shining star" whether a currently open dashboard is marked as a favourite. To remove it from your favourites, click the button again.
	See also Add dashboards to favourites.
ಳ	Click this button to open the "Manage dashboard access" dialogue box and share it with other users of Infront Investment Manager.
"Share dashboard" button	If the dashboard is currently shared with at least one other user, you will see the "Manage" button described in the next line here.
	See also Share dashboards.
🗳 MANAGE	Click this button to open the "Manage dashboard access" dialogue box and manage dashboard access by other users.
"Manage" button	This button is visible if the dashboard is currently shared with at least one other user, otherwise you will see the "Share dashboard" button described in the line above.
	See also Share dashboards.
ð	Click this button to open the "Dashboard properties" dialogue window.
"Properties" button	For more information about the settings, see Dashboard properties.
"This dashboard was created by user XY" text	This information appears if the currently open dashboard was created by another user. "Superordinate" dashboards such as standard Infront or standard company dashboards cannot be edited (lock symbol).
DISCARD "Discard" button	If you have made changes to private dashboards but have not yet saved them, you can reset the changes to the last saved status of the dashboard using this button, which is only visible if you have done so.

Element	Description
S ✓ "Versions" drop-down list	Click this button to open the history of the saved Dashboard versions.
SAVE "Save dashboard" button	This button allows you to save the current dashboards configuration. If there are currently no changes to be saved, the button is disabled ("greyed out").
+ "Open widget gallery" icon	At the height of the header of the private dashboard, you will also find the icon for opening the Widget Gallery on the right-hand side.

3.4.2 Dashboard Explorer

Use the Dashboard Explorer to manage your dashboards. With the corresponding permission, you can create a folder and menu structure for your dashboards on several levels.

1

Use the drop-down list at the top left of the dashboard (next to the title "Markets") to open the Dashboard Explorer to select and configure the dashboards.



In the open Dashboard Explorer at the top, you find the commands for creating and copying dashboards.

In the "Recent" section, you find the recently opened dashboards (up to 10) allowing you to quickly select them.

Point to an entry to see the date of the last saved changes of the corresponding dashboard:

EUROPEAN INDICES	ø
RECENT	
A EUROPEAN INDICES	å
Last modified: 01/09/2022 11:12	2:35 -
CERTIFICATE	Ш
OVERVIEW EU	
GERMANY	

Dashboard templates are indicated by an icon on the right side (in the example above, it's the "TEST RK1" dashboard).

In the "Folder" area, you find all dashboards that you have access to. The top folder area divides the dashboards in the following folders:

- vwd dashboards
 - In this folder, you find the default dashboards created by Infront Financial Technology GmbH.



- Company dashboards
 In this folder you find t
- In this folder, you find the dashboards globally defined by the corresponding client.
- Shared dashboards Here, you find all dashboards that other users have shared with you. When you point to these entries with the mouse, the corresponding user names are displayed in a tooltip. See also Share dashboards.
- Private dashboards

In this folder, you find your private dashboards that only you have access to.

In the Dashboard Explorer, you can create further subfolders (if you have the corresponding permission).

Dashboards that you currently share with other users are indicated by this symbol in the Dashboard Explorer:

EUROPEAN INDICES

You can drag dashboards directly from Dashboard Explorer and drop them into the favourites bar. This automatically open the editing view for Favourites.

3.4.3 Create dashboards

To create a new dashboard:

- 1. Open the Dashboard Explorer in the upper left corner of the dashboard bar.
- 2. Select the "New dashboard" item in the corresponding folder or subfolder of your private dashboards.
- 3. In the "Create dashboard" dialogue window that appears, enter a descriptive name in the "Name" input field.
- 4. To use the dashboard as a template, select the "As template" option. For more information, see Create new dashboard as template.
- 5. If you want to use the new dashboard as an overlay template for search results, select the "As overlay template" option. For more information, see Create new dashboard as overlay template.
- 6. Then click the "Create" button. The new (empty) dashboard opens.

For more information about working with dashboards, see Dashboard Explorer.

For more information about how to create a new dashboard based on an existing dashboard, see Copy dashboards.

For more information about editing dashboards, see Edit dashboards. For more information about widgets in dashboards, see Working with widgets and Widget overview.

3.5 Favourites

In all dashboards, you can select your favourites and store them for quick access in the favourites bar in the title bar at the top of Infront Investment Manager.



The sections below explain how to organise your favourites.

See also:

· Add dashboards to favourites



- · Open favourites
- Sort list of favourites
- Remove dashboards from favourites

3.6 Context menus

A context menu is available in many places in Infront Investment Manager, allowing you to quickly open widgets, search for securities and configure your settings.



3.7 Widget Gallery

In the Widget Gallery, you select the Widgets that you want to add to your **private dashboards**. The widgets available depend on your licence. You can find the Widget Gallery on the right side of Infront Investment Manager.



	• Q 🖈	🌣 🗱 ?	🛙 Infront 🚦
DISCARD SAVE	Q Search for widge	?ts	
	SHARES	BONDS	DERIVATIVES
	FUNDS	INDICES	OTHER
	- DEFAULTS		
	Analyst Recomme Analyst recommendat		
	Arbitrage Table of trading venue	es (exchanges, MTFs) fo	or a security
	Chart Chart - historical time	series for a single inst	rument
	Company News News for shares and in	ndices	
	DZ BANK Research Research and informa	h & Media ition area of a provider	
	Free Text Widget for displaying	any text	
	Full Quote Basic share price infor	rmation for a security	
	Market Depth Visualisation of tradin	g activities for a securi	ty
	News Search News search		

If you have opened the Widget Gallery by clicking the "Add widget" icon, you can search for widgets by using the upper search field or directly open widgets of the individual security types or asset classes. There is a quick search of the most important widgets for the following security types:

- Shares
- Bonds
- Derivatives
- Funds
- Indices
- Other

Click the buttons to switch between to individual categories. These categories are subdivided in the "Defaults," "Calculators" and "Other" sections. You can expand or collapse the content of the widget sections. For more information about the individual categories, see the following sections.

In the sections, the widgets are sorted alphabetically.

To open a widget in the dashboard, just click the widget in the Widget Gallery. The widget appears at the bottom of the dashboard.



See also:

- Open Widget Gallery
- Search widgets in the Widget Gallery
- Keyboard shortcuts in the Widget Gallery
- Close Widget Gallery
- All widgets in the Widget Gallery

3.7.1 Open Widget Gallery

To open the Widget Gallery in **private dashboards**, click the "Add widget" icon on the right side of Infront Investment Manager.



The Widget Gallery opens on the right side of the browser window.

3.7.2 Search widgets in the Widget Gallery

Use the search field in the upper part of the widget gallery to search for a particular widget. When typing the first letters of the widget name or a part of the widget description, the live search shows the corresponding results directly.





If a widget is categorised in the "Defaults" section of a certain instrument type, then the widget category is shown next to the widget name in the results list.

In the example, the "Earnings Estimates" widget indicates the shares category and the "Risk & Performance (Funds)" widget indicates the funds category because they each are in the "Defaults" category of the corresponding instrument.

Click a search result to open the widget in the dashboard.

Click the "(x)" icon to clear the search field and enter a new search term.

Various widgets can also be found using related keywords. For example, you can enter the term "PDF" for the "Related Documents" widget. An overview of the search terms can be found in the chapter All widgets in the Widget Gallery.

3.7.3 Close Widget Gallery

To hide the Widget Gallery, click the "Close Widget Gallery" icon or press <ESC>.

DISCARD SAVE	Q Search for widgets		
	SHARES	BONDS	DERIVATIVES
	FUNDS	INDICES	OTHER
	▼ DEFAULTS		
	Analyst Recomme Analyst recommendat		
Arbitrage Table of trading venues (exchanges, MTFs) for a security			or a security
Chart Chart - historical time series for a single instrument			ument
	Company News News for shares and in	ndices	

4 Working with widgets

Learn how to work effectively with widgets.

See also:	
 Widget structure Open widgets Arrange widgets on the dashboard Drag securities to widget Copy widgets Export widget data to CSV file Export widget data as "Data Analytics XL" file Export data of the widgets to Excel Add-In Print widgets Group widgets Remove widgets from dashboard Information about widgets for products by DZ BANK User feedback on widgets 	

4.1 Widget structure

The elements and functions described here can be found in many standard widgets.



The standard elements in detail:

Element	Description		
Select security	The selection at the top left of the widget opens the quick search for security selection. In addition to using the securities search field, you can also select from the previously selected instruments below the search field.		
Security name	Pointing to the security name displays a "drag & drop" symbol. Hold down the left mouse button to drag the security into other widgets. For more information, see Drag securities to widget.		
Select trading venue, security type, calculation type	In addition to the security selection, there are usually one or more further drop-down lists. In many widgets, you can select the trading venue for a security, change the calculation method or select the security type. The menu allows you to configure the content of the widget.		
Current price dates	Here you find the current price information, for example, the last traded price of the security with the currency at the trading venue selected. You see the absolute and percentage change to the close price of the previous day. The direction and colour of the arrow next to the price illustrate the current price development.		
Security master data	in the upper right corner of the widget selection, you will find further information on the currently selected security, for example in a "Full Quote" widget: • ISIN • WKN		
	Clicking the ISIN or WKN copies them directly to the Clipboard. Pointing to the "ISIN "or "WKN displays an info window showing further details. Clicking the info window keeps it in the foreground. IMAR O Apple O TO T		

Element	Description
Element "Show/hide widget header" icon	Description [Only for selected widgets, for example, "Chart", "Chart analysis" or "Watchlist"] Expands or collapsed the header of the widget. Example: Chart with an expanded and collapsed header (Construction of the selected are selec
"Maximise widget" icon	Apr. 2022 Jun. 2022 Aug. 2022 Oct. 2022 Dec. 2022 Feb. 2023 Maximises the widget. The widget then takes up the entire dashboard. Click the icon again to restore the original dashboard view. Clicking this icon opens the widget settings. If the widget is very small, this icon disappears. In these cases, however, the "Settings" command in the menu icon is available to you as an alternative at any time.

Element	Description	
Menu icon	Click this icon to open the menu with the standard commands, for example, the settings. For more information, see Commands in the widget menu.	
"Close" icon	Click this icon to remove the widget. For more information, see Remove widgets from dashboard.	
Basic information in the footer	 In the footer of the widgets, you find further information: Real time or delayed? Time of the last price update Calculation date of the key figures 	
Page navigation	If a table in a widget contains many rows, then the rows are split across several pages. Use the controls below the list to go through the pages.	
(i) Up to 5 decimal places are displayed for the price data in the widgets and up to 6 decimal places for exchange rates.		

See also:

- · Commands in the widget menu
- Sort tables in widgets

4.2 Open widgets

In Infront Investment Manager, you have various ways to create or open widgets in a (private) dashboard:

- Open widget from Widget Gallery
- Open new widget using the menu icon in a widget for individual securities
- Open single widget in a list using the menu icon in the row of the security (for example, in watchlists, index lists or portfolios)
- · Place widgets directly from hits in search result
- Duplicate open widgets

4.3 Drag securities to widget

In Infront Investment Manager, you can drag securities (for example, from Watchlists or other widgets) to other appropriate widgets. To do this, hold down the left mouse button and drag the security name into the desired widget:

	V) XETRAV)		(1)(5)
ASF DE000BASF111 BAS			
160.31 -0.81 +1.36% 30 Pieces			·
TRICES			
Bid / Ask price	Replace	security	74.61 / 17/04/2019
Bid / Ask size	NCP18CC 879/355	YTD LOW	58.41 / 31/05/2019
Open / Close			84.91 / 26/07/2018
High / Low			57.35 / 10/12/2018
Cum. volume	897.37 k		DAV
	60.292 / 9008 846900 DAX 12,325.98	1Y/5Y benchmark perf.	-22.36% / -41.389

As a rule, these securities replace the previously displayed ones. In a chart, for example, you can also include the securities as a comparison value. In other widgets, too, the incoming securities are always used as sensibly as possible, for example, as an underlying in the Option Matrix.

Widgets that are not suitable for the security (or type of security) will display corresponding note.

4.4 Export data of the widgets to Excel Add-In

If you have licensed the Infront Excel Add-In, a corresponding "INFRONTXL" button for the export is available in the "Chart" and "Full Quote" widgets as well as in watchlists.



4.5 Group widgets

You can configure up to 4 different widget groups for each dashboard. Use this functionality to exchange securities quickly across several widgets.



To add widgets to groups:

1. Click the group icon in the lower right corner of the widget.

dicators incl. dividends/distribution

FULL QUOTE 📿 BCO BIL.VIZ.ARG.NOM.EO-49 XETRA (EUR) 🗸			$\boxtimes \vdots \times$	
ISIN: ES0113211835 WKN: 875773				
€6.966 ② +0.016 +0.23% 1,700 Pieces	U	78		
PRICES		DIVIDENDS ~		
Bid / Ask price	6.869 / (2) 6.876	Div. yield (2023e)	7.17%	
Bid / Ask size	4,146 / 4,146	Dividend (2023e)	0.50 EUR	
Bid / Ask time	9:57:59 AM / 9:57:59 AM	Div. yield (2022)	1.72%	
Spread	0.007 / 0.10%	Dividend (10/7/2022)	0.12 EUR	
Open / Close	6.961 / 6.95	Payment freq.	Final dividend	
High / Low	6.966 / 6.961	1Y div. growth	416.67%	
Cum. volume (qty.)	2.25 K	AGM date	3/16/23	
VWAP	6.96589	Pay. date	10/11/22	
Real time Update: Feb 21, 2023, 9:58:01 AM Last price update: Feb 21, 2023, 9:10:06 AM Key figure calculation date: 2/19/2023 Key				

2. In the dialogue window that appears, select the relevant group(s) by selecting the corresponding checkboxes. This displays the coloured group symbols:



3. Proceed in the same way for other widgets you want to link.

In all selected widgets, the icons of the groups appear in the lower right corner. The colour of the symbols indicates the widget group.

If you now select a new security as an input object in one of the widgets, it is automatically exchanged in all grouped widgets of this group.

Use the command "Link all" to select all groups for this widget, use "Remove all" to clear all checkboxes.

You can also assign a widget to multiple groups. Thus, if you change the security in one widget assigned to three groups, then the security is used in all three groups. Grouped widgets with incompatible instruments show corresponding hints.

Example: Dashboard with grouped widgets



5 Widget overview

Here, you will find detailed descriptions of all widgets available in Infront Investment Manager.

See also:

- Fair Value Calculator (Share)
- Alerts
- All Fields
- Bond Data
- Bond Calculator
- Bond Spread Calculator
- Arbitrage
- Benchmark Bond Spread Calculator
- Best-Of Lists (DZ)
- Financials (balance sheet data)
- Exchange Calendar
- Broken Date Calculator
- Cap Floor Calculator
- · Chart
- Chart analysis
- Derivative Matrix
- Pages (DZ)
- Full Quote
- Trading Quote
- ESG Risk
- Fund data
- Fund Breakdown
- Fund Comparison
- Free Text
- Earnings Estimates
- Historical Prices
- Global Indices
- Index Membership
- Index Members
- · Corporate actions
- Key Figures
- Knock-Out Map
- Economic data
- Correlation Matrix
- Watchlist
- Market Depth
- MiFID
- News
- New Issues (DZ)
- Fair Value Calculator (Option)
- Option Matrix
- Warrant Matrix
- Warrants Calculator
- Performance Tile
- Portfolio
- DZ BANK Alternative Products
- DZ BANK General Documents
- Analyst Recommendations



- DZ BANK Research & Media
- Risk & Performance
- Risk-Return Matrix
- Commodity Spread Calculator
- Screener results
- Swap Calculator
- Swaption Calculator
- Pages (Thomson Reuters)
- Ticker tape
- Time & Sales
- Gainers & Losers
- Top Derivatives (DZ)
- Top Derivatives and New Issues
- Trading Signals
- theScreener Company Analysis
- Company profile
- Investment Calculator
- Volatility Chart
- VWAP Calculator
- vwd Pages
- FX Matrix
- FX Option Calculator
- FX Calculator
- Performance Calculator
- Certificate Data
- Certificate Comparison
- Interest Rate Calculator
- Yield Curves
- Related Documents
- Related Instruments

6 Search

Use the many options for searching securities in Infront Investment Manager. In the upper part of Infront Investment Manager, an input field is always available for a quick search for securities.

≡	Q 555750 X	
Ма	Result	GEN. SEARCH
	DT.TELEKOM AG NA	Share
GAI	DE0005557508 555750	
UAII	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
	DE0005557508	
	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
	DE0005557508	1011 0-15-5
1	OPTION ON DEUTSCHE TELEKOM AG OPT DE0005557508	ION Option
	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
•	DE0005557508	
:	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
	DE0005557508	
	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
1	DE0005557508	
	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
	DE0005557508	
:	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
:	DE0005557508	
	OPTION ON DEUTSCHE TELEKOM AG OPT	ION Option
	DE0005557508	

Enter your search term in the input field and select the relevant hit from the list.

If the matching hit is not available in the search results, you can use the "General search" button to switch to the general search, using help of which you can search and filter in detail for securities, pages and news.

In addition to the powerful (general) search, you find special menus and widgets to carry out a contextsensitive quick search. In this chapter, you find information about the various search functions.

- Quick search
- General search

6.1 Quick search

At the top of Infront Investment Manager, you need to search for securities in menus and widgets, you can use context-sensitive search fields. Thus you can quickly find the correct security.

Enter your search term in the search field field and select the relevant hit. Or quickly select a security from the list of your last search terms ("History") or currently trending securities ("Trending").

6.1.1 Quick search via the input field in the title bar

Proceed as follows to search securities:

1. Enter the search term in the search field.

≡	Q APP		×	
Ма	History	Trending		GEN. SEARCH
	Apple US0378331005 86	65985		Share
@	Digital Turbine US25400W1027 A	14MRK		Share
A	Appian Corp US03782L1017 A	2DR9Y		Share
	APPEN FPO [APX] AU000000APX3 A	12HVN		Share
ŝ	AppFolio US03783C1009 A	14TU7		Share
	Applied Materials US0382221051 86			Share
	Applied DNA Scient US03815U3005 A			Share
	Applied Optoelect US03823U1025 A			Share
	APPLIED GRAPH. GB00BFSSB742 A	1W8HP		Share
FUL	Applied Genetic T US03820J1007 A:			Share

The quick search shows you results as soon as you start typing the second letter and refines the search with every additional character.

Below the search field, these search results are shown with the name, asset class and WKN of the security. You can use the arrow keys to go through the search results.

2. Select the hit you are looking for.

This is then first opened in a Short portrait and can be processed further, for example by using the menu icon.

PDF short portrait		🗅 :	×
	Q (USD) ~ ~ PC I Share I Ordinary Share I Computer 66 MAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA	CHART APPLE APPLE APPLE APPLE AUTO IY Apple US0378331005 865985 APC Share Ordinary Share NASDAQ 5162.88	
PRICES ~	1	APPLE (USD) (NAS)	
Bid / Ask price	⇒ 162.13 / ⇒ 162.19		
Bid / Ask size	200 / 400		
Spread	0.06 / 0.04%	months in 1	
Open / Close	161.12 / 162.88	140	
High / Low	163.17 / 158.46	120	
Cum. volume	1.81 M		
WAP Real time Update: Apr 26, 2022, 2 11:31:40 PM Key figure calculation indicators incl. dividends/distribut	160.48816 52:47 PM Last price update: Apr 25, 2022, n date: 4/25/2022 Key performance ions	100 May 2021 Sep. 2021 Jan. 2022 Real time Updated: Apr 25, 2022, 11:31:40 PM	

As an alternative to selecting the hit by mouse click, you can also drag and drop it directly from the search results into a widget on the dashboard.

If you do not find the desired result via the quick search in the title bar, switch to General search by using the "General search" button.

6.1.2 Quick search in menus and widgets

A quick search is also integrated in numerous widgets, analogous to the quick search via the title bar described above. For example, you always open a quick search for selecting the input object by click the "Instrument search" icon at the top left in widgets.

	CHUGAI PHARMACEUT L	1	D	:	
	Instrument search				
	History		GE	N. SI	ARCH
	CHUGAI PHARMACEUT L JP3519400000 857216				Share
ſ	Skyworks Solutions US83088M1027 857760				Share
l	SARTORIUS AG VZO O.N. DE0007165631 716563				Share
	Apple US0378331005 865985				Share
	RALLYE FR0000060618 878000				Aktie
	AIR FRANCE -KLM FR0000031122 855111				Aktie
	FISHER(J)& SONS GB0003395000 871184				Aktie
	Festi IS0000020584 A1XCLC				Aktie
	MERCEDES-BENZ GRP NA O.N. DE0007100000 710000				Aktie
	ERICSSON NIKOLA TESLA dd HRERNTRA0000 907950				Aktie

If you do not find the relevant result via the quick search in the title bar, switch to General search by using the "Gen. Search" button.

See also:

- Open results of the quick search via drag & drop
- Quick search History
- Quick search Trending

6.2 General search

In the (general) search, the securities databases are searched for hits. To start a search:

1. Enter the search term in the quick search at the top.

2. Select the appropriate hit in the search result of the quick search or start the detailed search by using the **"General search" button**.



3. Refine your search in the search screen of the general search. You start each search process here with the <RETURN> key or the search icon ("magnifying glass") to the right of the input field.

_			_			· · ·											
						710					Q						
						Include instrumen	ts without	first price or with out	dated prices								
Sear	ch					Certificate ETF Fund 203 23 4		Quotations Option Share 1,921 50	Open in Screener								
										NET CHANGE							
	710000	DE0007100000	710000	Germany	Berlin	MERCEDES-BENZ GROUP AG NAM	EUR	2:13:32 PM	57.69		+3.96%	4,334	57.69	57.80	4,326	140	55.4
	710000	DE0007100000	DE000	Germany	Banque Cant	MERCEDES-BENZ GROUP AG NAM	EUR	3:24:01 PM					0.00	0.00			55.2
	710000	DE0007100000	710000	Germany	Düsseldorf	MERCEDES-BENZ GROUP AG NAM	EUR	3:03:29 PM				700			700		55.2
: 🗌	710000	DE0007100000	MBG_D	Germany	CHI-X4	MERCEDES-BENZ GROUP AG NAM	EUR	2:36:20 PM	57.89	+2.54	+4.59%	0	0.00	57.90	45	490	55.
	710000	DE0007100000	710000	Germany	XETRA	MERCEDES-BENZ GROUP AG NAM	EUR	3:25:34 PM	57.76	+2.51	+4.54%	380	57.73	57.76	1,429	1 M	55.
	710000	DE0007100000	MBG_D	Germany	BATS - BXE - D	MERCEDES-BENZ GROUP AG NAM	EUR	3:20:37 PM	57.725				39.00	57.90			55.
	710000	DE0007100000	710000	Germany	Frankfurt	MERCEDES-BENZ GROUP AG NAM	EUR	3:05:23 PM				440			440		55.
	710000	DE0007100000	MBG.CH	Germany	Switzerland	Mercedes-Benz	CHF	10/17/22		±0.00	±0.00%	100		0.00			95.
	710000	DE0007100000	710000	Germany	Hamburg	MERCEDES-BENZ GROUP AG NAM	EUR	3:04:11 PM				478			866		55.
	710000	DE0007100000	MBG-E	Germany	Switzerland	Mercedes-Benz	EUR	10/17/22		±0.00	±0.00%		0.00	52.17			55.
	710000	DE0007100000	710000	Germany	Hannover	MERCEDES-BENZ GROUP AG NAM	EUR	2:17:53 PM	57.67			380			866		54.
	710000	DE0007100000	MBG.IT	Germany	Milan After ho	MERCEDES-BENZ GROUP	EUR	7:00:00 AM	55.20								
	710000	DE0007100000	710000	Germany	Munich	MERCEDES-BENZ GROUP AG NAM	EUR	1:14:24 PM	57.46			285	57.75		259		55.
	710000	DE0007100000	MBG.IT	Germany	Milan	MERCEDES-BENZ GROUP NAMEN	EUR	3:07:43 PM				240			660		55.
	710000	DE0007100000	710000	Germany	Stuttgart	MERCEDES-BENZ GROUP AG NAM	EUR	3:25:05 PM								15 K	55.
	710000	DE0007100000	MBG_D	Germany	Cboe Europe	MERCEDES-BENZ GROUP AG NAM	EUR	3:24:53 PM				482	57.73	57.75	103		55.
	710000	DE0007100000	DE000	Germany	Tradegate	MERCEDES-BENZ GROUP AG NAM	EUR	3:24:02 PM				600			900	169 K	55.
	710000	DE0007100000	0NXX.U	Germany	London SE Int	MERCEDES ORD MERCEDES-BENZ	EUR	3:24:53 PM	57.72	+2.33	+4.20%	10,000	57.15	58.34	10,000	394 K	55.3

4. The hits are displayed in the search results.

The search results are subdivided in areas for each individual type. Use the buttons above to switch to the type of security you are looking for. Below on the buttons, the number of securities found for a type is shown in brackets. The columns displayed are optimised for the individual types of securities. By using the "Instrument/Quotes" switch, you can decide whether you want to display all quotes of the securities at the respective trading venues or only the instruments.

🟹 Tips

Click the "Open in screener" button to open the currently displayed search result in the corresponding Screener (in the example above, in the share screener). Use this functionality to refine your search when there is a great number of hits in the screener.

Directly below the input field, you can also search for securities without a current price that are ignored by default in the search using the "Include securities without first price or with outdated prices" button.

For the hits in the search result, you can decide in the User profile settings whether the hit at the default trading venue should be displayed first when searching for securities in the search result. This setting is selected by default. If this setting is cleared, then for example for German standard shares, "XETRA" is displayed as the first search result (however, this also depends on the activations).

5. Select the corresponding search result by clicking it.

This opens in a Short portrait, which can be further processed by using the menu icon.

Instrument portr	ait			占 : ×
	RCEDES-BENZ GRP NA GRP NA O.N. I DE000710 le			CHART MERCEDES-BENZ GRP NA → ▲ ✓ AUTO → 1Y → ▲ → MERCEDES-BENZ GRP NA O.N. I DE0007100000 I 710000 I MBG I Share I Ordinary Share I XETRA I €57.79
PRICES		DIVIDENDS 🗸		MERCEDES-BENZ GRP NA O.N. (EUR) (XETRA)
Bid / Ask price	🔿 57.77 / 🕥 57.80	Div. yield (2023e)	8.14%	70
Bid / Ask size	855 / 1,483	Dividend (2023e)	4.50 EUR	Much m ha
Bid / Ask time	3:28:31 / 3:28:31 PM PM	Div. yield (2022)	9.28%	60 60 61.79
Spread	0.02 / 0.03%	Dividend (5/2/2022)	5.00 EUR	₩ ^{~~} ^{~~} 50 √
Open / Close	56.47 / 55.25	Payment freq.	Annually	
High / Low	57.99 / 55.90	1Y div. growth	270.37%	40
Cum. volume Real time Update PM Key figure ca dividends/distribu	1.40 M e: Oct 18, 2022, 3:28:32 P lculation date: 10/17/20: utions	AGM date M Last price update: C 22 Key performance in	4/ว۹/วว Oct 18, 2022, 3:28:29 Idicators incl.	Jan. 2022 Apr. 2022 Jul. 2022 Oct. 2022 Real time DASHBOARD_CONFIGS.QUALITY.REALTIME Real time Updated: Oct 18, 2022, 3:28:29 PM

6. In the "Place widget" dialogue box that appears, specify whether you want to place the widget at the top of the dashboard ("Add to top" button) or at the end of the dashboard ("Add to bottom" button):

⊒ Q 710	×									• 0 •	t 🏠 ? 🔺	Infront :
MARKETS - TEST1234		⋧⋞⋫						DISCARD S ~ SAVE	> Q full			
PLACE WIDGET					ADD T							
				EDES-BENZ GRP NA P NA O.N. I DE00071000			utomobile	2 ² :				
			PRICES									
			Bid / Ask price	🕲 57.65 / 🕲 57.68	Div. yield (2023e)	8.14%	Currency	EUR				
			Bid / Ask size	176 / 1,484	Dividend (2023e)	4.50 EUR	Auction	0.00				
			Bid / Ask time	3:30:08 / 3:30:08 PM PM	Div. yield (2022)	9.28%	90D vola.	36.29%				
			Spread	0.02 / 0.03%	Dividend (5/2/2022)	5.00 EUR	PE (2021)	2.56977				
			Open / Close	56.47 / 55.25	Payment freq.	Annually	EPS (2021)	21.50				
			High / Low		1Y div. growth	270.37%		57.62 B				
			Real time Update: C performance indicate	ict 18, 2022, 3:30:12 PM ors incl. dividends/distri	Last price update: Oct 18 butions							
High / Low	57,997 55,90	1Y div. growth		270.37%								
Cum, volume		AGM date		4/29/22								
Real time Update: Oct 18, 2022, 3 calculation date: 10/17/2022 Key	:30:12 PM Last p	rice update: Oct 1	8, 2022, 3:30:09 PM Ke ends/distributions									

The new widget, for example, the "Full Quote" - widget, will then open at the corresponding place in the dashboard.

Securities selected by clicking them are displayed in the dashboard at the selected position in a "Full Quote" widget.



You can go through the pages by using the navigation elements

that appear when you "mouse over". Use the "Mouseover" to show navigation elements that you can use to page through the list.

You can also use the checkboxes in the first column to select multiple hits and add them to a watchlist or portfolio of your choice. For more information, see Select several hits from the search results.

To close the search without selecting an instrument, click the "Close" icon to the right in the upper right corner of the search window and press <ESC>.

Sea						Instrum	ients
Sec					Certificate	ETF Fund 23 4	Leverage 1,034
SELE							
		INSTRUME NT ID	COUNTRY	TRADING VENUE	NAME		CURREN CY
		710000	Germany	Berlin	MERCEDES-BENZ GRO	UP AG NAM	EUR
:		DE000	Germany	Banque Cant	MERCEDES-BENZ GRO	UP AG NAM	EUR
:		710000	Germany	Düsseldorf	MERCEDES-BENZ GRO	UP AG NAM	EUR
:		MBG_D	Germany	CHI-X4	MERCEDES-BENZ GRO	UP AG NAM	EUR
ОРГ	EN AS	710000	Germany	XETRA	MERCEDES-BENZ GRO	UP AG NAM	EUR
	Dashboard	MBG_D	Germany	BATS - BXE - D	MERCEDES-BENZ GRO	UP AG NAM	EUR
	Chart In News	710000	Germany	Frankfurt	MERCEDES-BENZ GRO	UP AG NAM	EUR
	Full Quote More	MBG.CH	Germany	Switzerland	Mercedes-Benz		CHF
COF	PY INSTRUMENT	710000	Germany	Hamburg	MERCEDES-BENZ GRO	UP AG NAM	EUR
:		MBG-E	Germany	Switzerland	Mercedes-Benz		EUR
ESC	;	710000	Germany	Hannover	MERCEDES-BENZ GRO	UP AG NAM	EUR
	Go to ESG module	MBG.IT	Germany	Milan After ho	MERCEDES-BENZ GRO	UP	EUR

Use the menu icon to the left of each row to Security type open securities in the default dashboard for this security type. The usual commands for opening the instrument in other widgets (chart, news...) are also available. Use the alert icon at the bottom of the "Tools" area to switch directly to the "Price alert" dialogue window. Commands are also available to open the security in Compass or the ESG module.

See also:

· Select several hits from the search results

7 First login

When using the credentials received from Infront Financial Technology GmbH for Infront Investment Manager or another service for the first time, you are prompted to change your password (for security reasons).

To log in online for the first time, follow these steps:

- Open the link you received for the log in. The log in page opens in the browser, where you can already select a different language. For more information, see the section Language selection.
- 2. In the first input field, enter the user name you received or your e-mail address known to Infront Financial Technology GmbH.
- 3. In the second input field below, enter the temporary password you received.
- 4. Click the "Log in" button.
- 5. On the page that appears, enter the new password and confirm it. Make sure you follow the for the new password Password rules.
- 6. After entering the new password, click the "Send" button.

In the browser, the start page with all services and products appears. You can open the products activated for you.

vwd: your products						
REGHUB DOCUMENT-HUB	кебнив Template Manager	CUSTOMER ACCOUNT POSTBOX				
IDENTITY MANAGEMENT / OAUTH2 Account Management	MIFID II TARGET MARKET SERVICE	MIFID II COSTS SERVICE				
MIFID II PROFILING SERVICE	INVESTMENT MANAGER					
Change language:						

- 7. Select the "Infront Investment Manager" entry.
- 8. Infront Investment Manager opens. When you log in for the first time, you see the welcome page.
- 9. Accept the Privacy Policy, confirm the information about the usage of cookies and, optionally, consent to receiving advertisement material.

The welcome page allows you to specify or edit the "WP2 advisor number", "Position" and "E-mail" on your first login This data is transferred to the "Settings & Profile" module and can be changed there again, if necessary.

After you confirm the Privacy Policy, you see the actual user interface of Infront Investment Manager. When you open the application for the first time, you will see introductory tooltips ("intros") to get you up and running in Infront Investment Manager.



You can control these intros by using the "Close", "Back" and "Next" buttons or directly jump to one of the steps by clicking the small dots:



D To start Infront Investment Manager, you must confirm the Privacy Policy when you log in for the first time.

8 Password rules

Please note the minimum requirements when setting a password:

- The password is at least 9 characters long.
- The password has at least one capital character.
- The password has at least one small character.
- The password has at least one special character.
- The password differs from the last 12 passwords of the user.

9 System requirements

To use Infront Investment Manager effectively, you only need a modern up-to-date browser where the cookies, JavaScript and the local storage are enabled. You will also need a memory of 4 GB RAM or more.

The system requirements in detail:

Element	Description
Browser	 Google Chrome (current version) Mozilla Firefox (current version or current ESR) Microsoft Edge (current version) Safari (2 last major versions)
Browser settings	 Cookies enabled localStorage enabled JavaScript enabled
RAM	>= 4 GB
CPU	To be evaluated / defined

Element	Description
Access URLs (firewall configuration may need to be adjusted)	General URLs: • https://gateway.cloud.eu.infrontservices.com • https://idm.cloud.eu.infrontservices.com • https://gateway.eu.infrontfinance.com • https://gateway.eu.infrontfinance.com • https://fonts.gstatic.com • https://fonts.googleapis.com • https://code.highcharts.com • https://code.highcharts.com • https://wsv3.vwd-webtech.com • https://wsv3.vwd-webtech.com • wss://wsv3.vwd-webtech.com • wss://login.infrontservices.com Specific URLs for DZ BANK (these replace the general URLs here): • https://cdn.jsdelivr.net • https://cdn.jsdelivr.net • https://cdn.jsdelivr.net • https://dm.vwd.com (announcement) • https://dm.vwd.com (Platow) • https://fonts.googleapis.com • https://fonts.googleapis.com • https://fonts.googleapis.com • https://fonts.googleapis.com • https://fonts.googleapis.com • https://fonts.googleapis.com • https://fonts.googleapis.com • https://ode.highcharts.com • https://analytics.vwd.com (Valordata Browser)
	 https://mediathek-meingis.corporate.tube (media center) https://wsv3-dz.vwd-webtech.com wss://wsv3-dz.vwd-webtech.com Production URLs may vary for users. The URLs can be configured for each user so that other domains can be used.
IP addresses	 128.127.8.48/28 (infrontservices.com) 128.127.9.16/28 (infrontservices.com)

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