

# FitchRatings | Research&Data

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# FitchRatings PRO

# QUICK START GUIDE

January 2024

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# GETTING STARTED

Welcome to Fitch Ratings PRO, the next generation web-based platform that helps you more quickly and efficiently find the Fitch Ratings Research & Data you need across various sectors and industries to make better-informed credit risk and investment decisions.

To get started:

1. Navigate to <https://pro.fitchratings.com> and input your credentials in the sign-in screen:

2. First Login Onboarding Instructions:

- a. Accept the Fitch Terms of Use.
- b. Input your job role(s).
- c. Select sectors of interest.
- d. Select sub-sectors of interest.
- e. Optional: Creation of portfolio(s) for your selected sectors and regions via the onboarding modal or by uploading a CSV file.

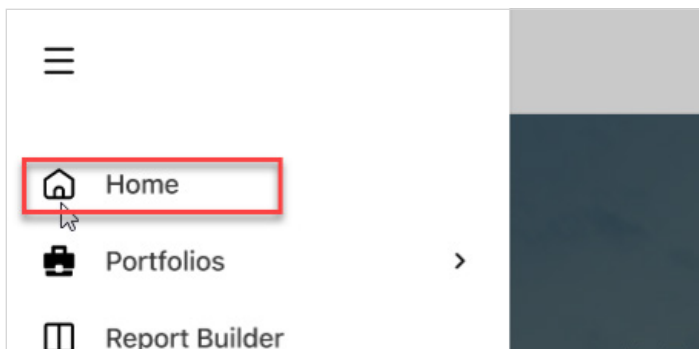
After completion of steps 'a' through 'e', or if not signing in for the first time, you will see the Fitch Ratings PRO Home Page personalized to the preferences specified in the Onboarding Sequence.

# HOME PAGE AND SITE NAVIGATION

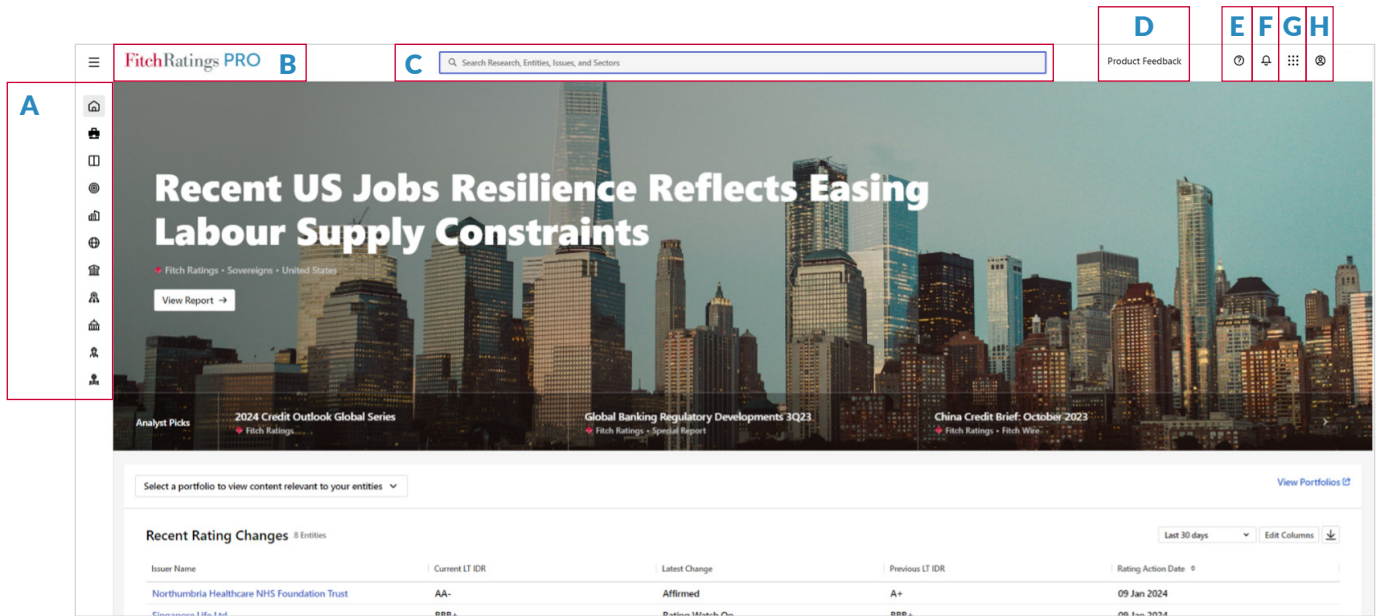
In the Fitch Ratings PRO platform, you can view important ratings, research, events, and multimedia content of interest to you directly on the Home Page. The content shown is personalized based on your selections from the onboarding wizard (i.e., your role, sectors of interests, portfolios).

To access the Home Page:

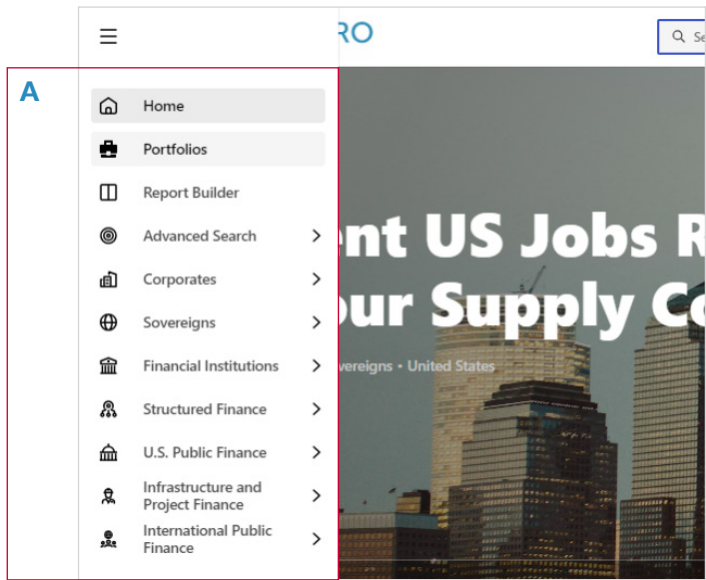
1. Log in to Fitch Ratings PRO – it is the default page opened upon login.
2. If on another part of the platform, you can use the left-hand navigation menu and click on 'Home' or on the Fitch Ratings PRO logo in the top left corner of the site.



Fitch Ratings PRO site navigation controls, present in the site header on every page:



Left-Hand Navigation Menu, Expanded



- A. Left-Hand Navigation:** Upon hover, the left-hand navigation menu expands to show quick links to Home, Portfolios, Report Builder, Advanced Search and each of the sector and sub-sector pages.
- B. Fitch Ratings PRO logo:** Upon click, takes you to Home Page.
- C. Quick Search Bar:** The search bar is in the front center portion of the site header, regardless of the part of the site you are in. Allows you to search for entities, issues, and research.
- D. Feedback Button:** Allows you to enter feedback regarding your experience with the platform.
- E. Support Button:** Opens a drawer that allows you to access quick links on support articles for popular features, navigate to the Support Center page, and view feedback links.
- F. Alert Button:** Opens a drawer that allows you to see a quick view of your active alerts across content types and access the Alert Settings page.
- G. App Switcher:** Allows you to switch between different Fitch web platforms, such as BMI, Corporate Banker Hub and CreditSights.
- H. Profile Button:** You can access links to User Settings, Alert Settings and your saved items, as well as to change your password, provide feedback and sign out.

# QUICK SEARCH

In the Fitch Ratings PRO platform, you can search for Entities, Research and Issues. The search feature is one of the main ways you can navigate and access information across the platform.

To access Quick Search:

1. Click on the search bar at the top of the page. You may search by keyword for entities, issues, and research, but may also specify by swift code, LEI number, Fitch ID, or CUSIP/ISINs.

🔍 Search Research, Entities, Issues, and Sectors

2. The Quick Search modal opens when you click on the search box. If you have not entered any keywords, you will be taken to the 'Starter State' of the modal.
  - a. In this state, you will see: A text field where you can input your search query, your most recent searches and recently viewed entity or sector pages, as well as trending pages on the platform.
3. If you have entered keywords, you will see a version of the modal already populated with the search results.

## Quick Search Modal – Sample Entities Results

The screenshot shows a 'Global Search' modal with a search bar containing 'Ford'. Below the search bar, there are tabs for 'Entities' (selected), 'Issues', and 'Research 1934'. There are also dropdown menus for 'Sector', 'Rating', and 'Domicile'. The main area displays a table of search results for entities.

Name	Rating	Rating Action ...	Sector	Country	Issues
Ford Motor Company	BBB-		Auto & Related	United States	
The Ford Foundation	-		Diversified Services	United States	
Banco Ford SA	-		Universal Commercial Banks	Brazil	
Ford Capital B.V.	BBB-		Finance & Leasing Companies	Netherlands	
Ford Holdings LLC	BBB-		Finance & Leasing Companies	United States	
Ford Credit Auto Lease Trust 2021-A	-		Auto - Lease	United States	
Ford Credit Floorplan Master Owner Trust A	-		Auto - Dealer Floorplan	United States	
Ford Credit Auto Owner Trust 2020-REV2	-		Auto - Prime Loans	United States	

At the bottom of the modal, there is a link 'Need more filters? Try Advanced Search' and navigation buttons for 'Move', 'Select', and 'Close'. The footer shows 'Current LT IDR', 'Latest Change', and 'Previous LT IDR'.

### I. Searching for Entities:

- Results show the Entity Name, ID LTR, Rating Action Date, Sector, Sub-Sector, and Issue Count.
- You may filter by Sector, Rating Type, and Domicile.
- Clicking on the Entity Name or result row takes you to that entity page.

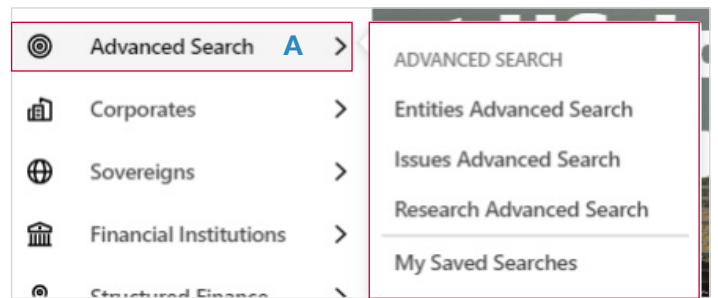
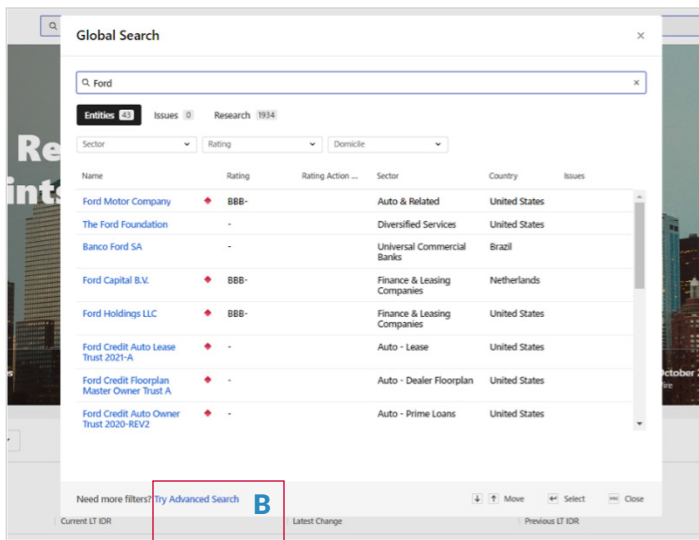
### II. Searching for Issues:

- Results show the issues relevant to the keywords entered.
- You may see the Entity Name, Seniority, Issue Type, Maturity Date, CUSIP and ISIN.
- You may filter by Issue Type and Currency.
- Clicking on the Entity Name takes you to the Issues section of that entity page.

### III. Searching for Research:

- Results show the research articles relevant to the keywords entered.
- You may see Article Title and Abstract.
- You may filter by Publish date and Research Type.
- Clicking on the Article Title takes you to that article page.

**Note:** For more specific queries, you may use the ‘Advanced Search’ by clicking on Advanced Search in the left-hand navigation menu (A) or by clicking on the ‘Try Advanced Search’ hyperlink in the bottom left corner of the Quick Search Modal (B).



# ALERTS

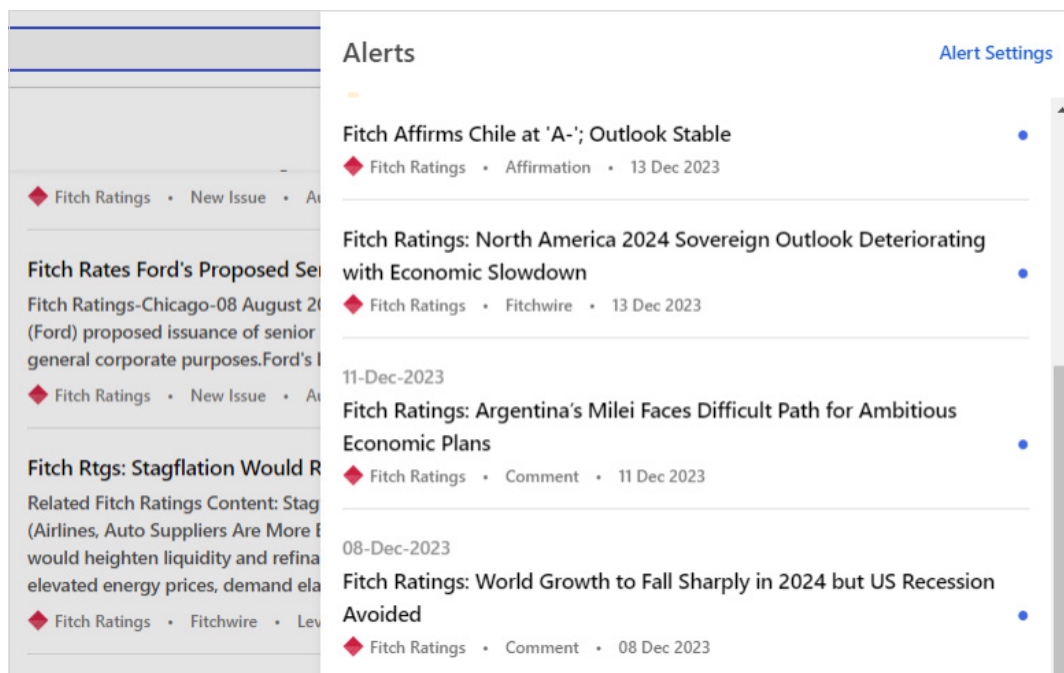
In the Fitch Ratings PRO platform, you can set up alerts to get notified about the latest updates for your content of choice. There are different types of alerts and accompanying settings, both of which help you tailor your notification experience to your needs.

You can access a quick view of your existing Alerts by:

1. Log in to Fitch Ratings PRO.
2. In the platform header, on the top-right corner, locate and click on the 'Bell Icon'.



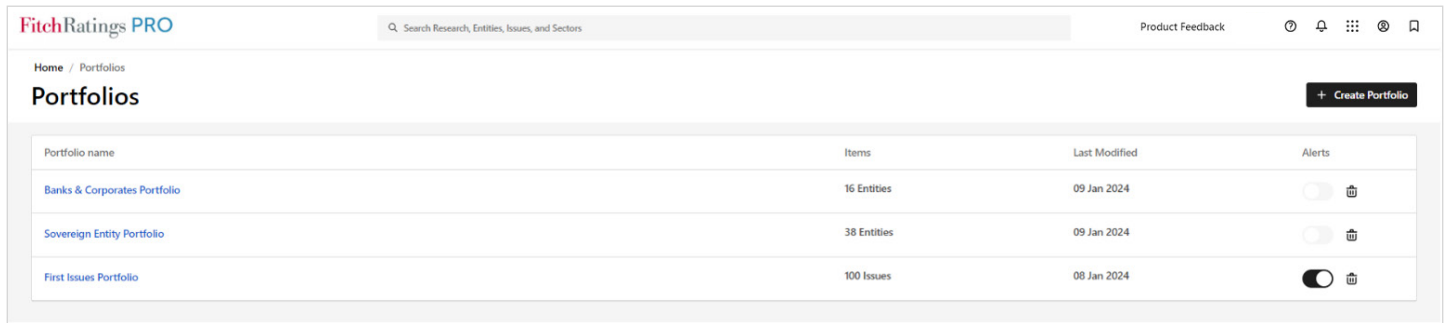
3. This will open the Alerts drawer, from where you may see your active alerts and access your Alerts Settings. Note: If no alerts have been set up, this will be blank.



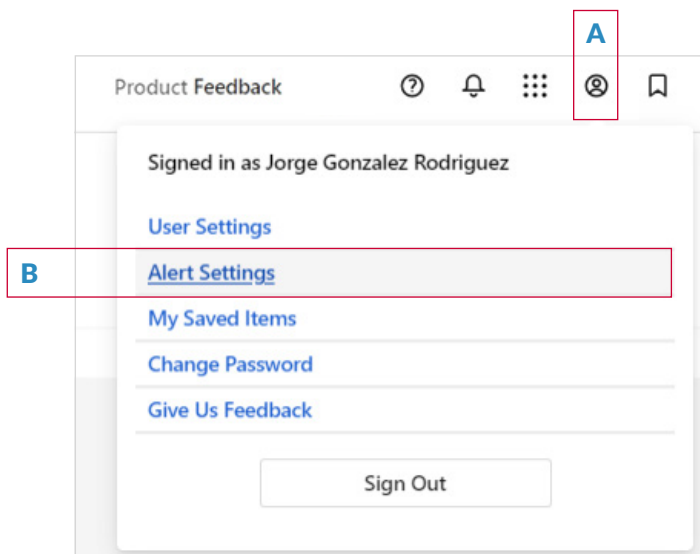


## I. Setting Up Portfolio Alerts

**Building a portfolio** is one of the most effective ways to utilize alerts. You may set portfolio-specific alerts by clicking on the Alerts Toggle in each of the portfolio rows on the portfolio index page.

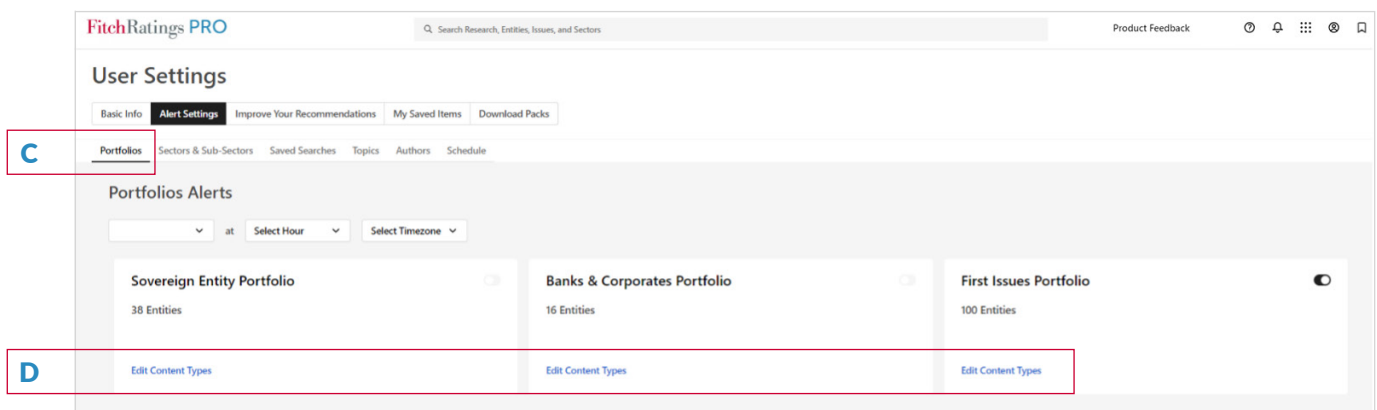


When a portfolio is created, alerts are turned on by default for that portfolio. You may toggle alerts on/off or customize alert types for one or multiple portfolios by clicking on the profile icon in the top right of the site header, selecting 'Alert Settings', and clicking on the Portfolios tab.



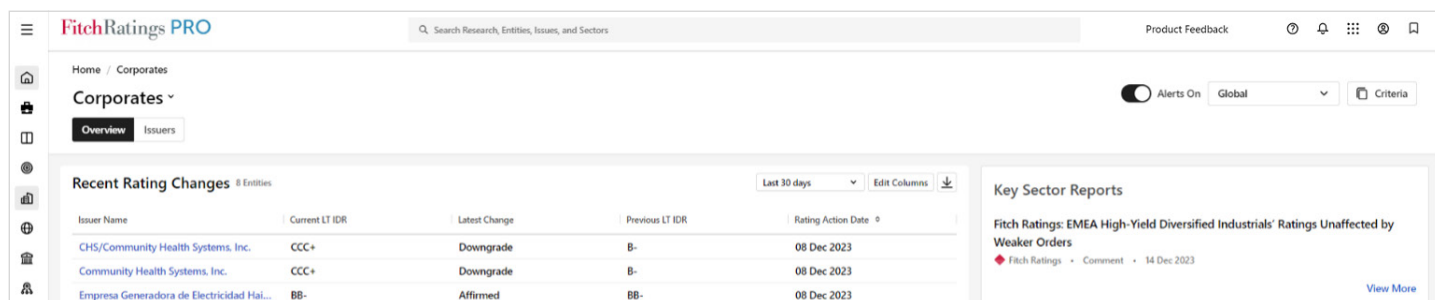
To customize portfolio alerts, you may click on:

- A. Profile Icon in Fitch Ratings PRO header
- B. Alert Settings
- C. Portfolios
- D. Edit Content Types



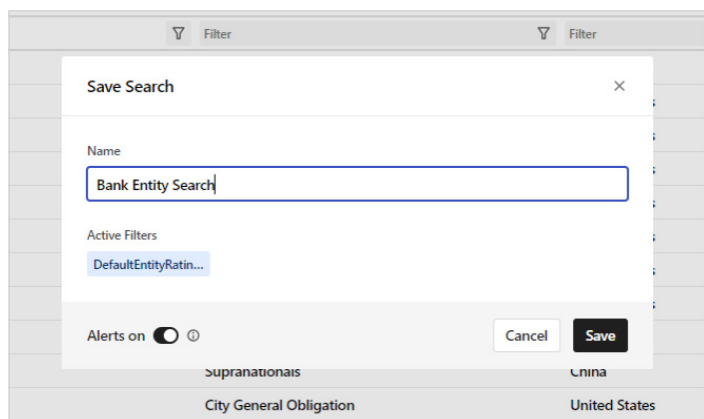
## II. Setting Up Sector Alerts

You may set an alert for a sector or sub-sector page by clicking on the Alert Toggle on the top right of the sector or sub-sector page header. Toggling alerts 'on' for a sector will enable the default set of alerts, which include weekly updates on Outlooks, Special Reports and Ratings Criteria.

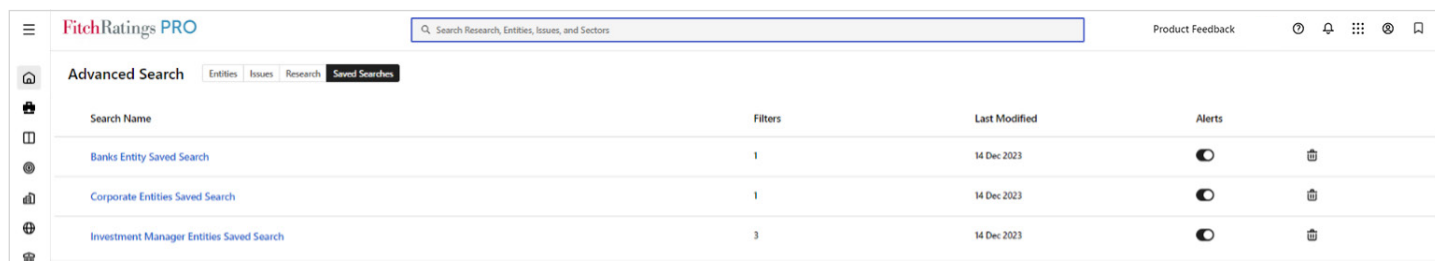


## III. Setting Up Alerts for Saved Searches

Alerts are automatically turned on when you create a new Saved Search from the Advanced Search screen. These may be turned ON/OFF manually by clicking the toggle on the 'Save Search' modal below.



Alerts for Saved Searches can be toggled ON/OFF retroactively by going to Advanced Search > Saved Searches tab and clicking on the individual alert toggles for each saved search.



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## About Fitch Ratings | Research & Data

Fitch Ratings | Research & Data, a Fitch Ratings sister business, helps credit, risk, and investment professionals make better-informed decisions and meet regulatory requirements, within and beyond the rated universe.

Fitch Ratings | Research & Data is a Fitch Solutions business. Fitch Solutions is a part of the Hearst-owned Fitch Group, a global leader in financial information services with operations in more than 30 countries.

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