

MARQUIS

Report Name	Report Description
Account Detail Listing for Maturing Accounts	The Account Detail Listing provides details of accounts that are maturing
Account Distribution by Product	The Account Distribution by Product provides the number, balance, and profit of accounts for each product
Adoption Rates	Adoption Rates provides the average number of days it takes for a new household to open a specific product. It also provides the penetration rate for each product.
Balance Distribution by Branch	The Balance Distribution by Branch shows the percentage of accounts in balance ranges
Branch Distribution	Branch Distribution provides household and account information across branches
Branch Summary	The Branch Summary gives account and household information across branches
Branch Summary - Products Detail	The Branch Summary gives product information across branches
Branch Summary - Services Detail	The Branch Summary gives service information across branches
Breakeven Report by Account Type	The Breakeven Report by Account Type provides the balances required for an account to be profitable
Campaign 12 Month Direct Response Performance	The Campaign 12 Month Direct Response Performance report provides insight into campaign performance and how activity equates to the return on the marketing investment
Closed Household Summary by Branch	The Closed Household Summary provides account and household information for households closed during a specific time period
Closed Household Summary by Institution	The Closed Household Summary provides account and household information for households closed during a specific time period
Closed Household Summary by Manager	The Closed Household Summary provides account and household information for households closed during a specific time period
Closed Household Summary by Region	The Closed Household Summary provides account and household information for households closed during a specific time period
Deposit Product Detailed Summary by Household	The Deposit Product Summary dashboard contains a detailed summary of deposit products sorted by the highest level of household penetration.
Deposit Production Detail: Daily	The Deposit Production Detail Daily report provides changes in new deposit accounts from the current date to the same day one year previous
Deposit Production Detail: Month to Date	The Deposit Production Detail Month to Date report provides changes in new deposit accounts from the current month to date to the same month to date period one year previous
Deposit Production Detail: Week to Date	The Deposit Production Detail Week to Date report provides changes in new deposit accounts from the current week to date to the same week to date period one year previous
Deposit Production Detail: Year to Date	The Deposit Production Detail Year to Date report provides changes in new deposit accounts from the current year to date to the same year to date period one year previous

MARQUIS

First Product and Next Product	First Product and Next Product shows the order in which products are opened in a relationship
Household Detail - Basics	The Household Detail provides basic information about each household
Household Detail - Products	The Household Detail provides the number and balance per product for each household
Household Detail - Profit	The Household Detail provides account and profit information about each household
Household Detail - Services	The Household Detail provides services information about each household
Household Distribution by Number of Unique Products	Household Distribution by Number of Unique Products provides key household statistics based on the number of products the household has
Household Distribution with Profit	Household Distribution by Branch provides deposit and loan details and profit information
Household Distribution without Profit	Household Distribution by Branch provides deposit and loan details and no profit information
Household Product Summary	The Household Product Summary provides account, household, and profit details with the number of unique products for each product
Household Profile	The Household Profile Report provides a period-over-period comparison of the most utilized fields and attributes of a financial institution at the Household level
Household Profit Listing	The Household Profit Listing gives details about each household with profit information
Institution Distribution	Institution Distribution provides household and account information across institutions
Loan Product Detailed Summary by Household	The Loan Product Summary dashboard contains a detailed summary of loan products sorted by the highest level of household penetration.
Loan Production Detail: Daily	The Loan Production Detail Daily report provides changes in new loan accounts from the current date to the same day one year previous
Loan Production Detail: Month to Date	The Loan Production Detail Month to Date report provides changes in new loan accounts from the current month to date to the month to date period one year previous
Loan Production Detail: Week to Date	The Loan Production Detail Week to Date report provides changes in new loan accounts from the current week to date to the week to date period one year previous
Loan Production Detail: Year to Date	The Loan Production Detail Year to Date report provides changes in new loan accounts from the current year to date to the same year to date period one year previous
Loan to Deposit Ratio	Loan To Deposit ratio assesses the liquidity of a financial institution by dividing the institution's total loans by its total deposits.
Manager Distribution	Manager Distribution provides household and account information across managers
New Accounts by Campaign	New Accounts by Campaign provides the number of direct responses for campaigns over a period of time.
New Accounts Opened by Branch and Product	New Accounts Opened by Branch and Product provide details for the new accounts for each branch and product

MARQUIS

New Accounts Opened by Institution and Product	New Accounts Opened by Institution and Product provide details for the new accounts for each institution and product
New Accounts Opened by Officer and Product	New Accounts Opened by Officer and Product provide details for the new accounts for each officer and product
New Accounts Opened by Region and Product	New Accounts Opened by Region and Product provide details for the new accounts for each region and product
New Balances by Campaign	New Balances by Campaign provides the balances of direct responses for campaigns over a period of time.
New Deposits & Loans Generated by Branch	New Deposits & Loans Generated by Branch provides deposit and loan details across branches for accounts opened during a specified time period
New Deposits & Loans Generated by Officer	New Deposits & Loans Generated by Officer provides deposit and loan details across officers for accounts opened during a specified time period
New Deposits & Loans Generated by Region	New Deposits & Loans Generated by Region provides deposit and loan details across regions for accounts opened during a specified time period
New Deposits and Loans Generated by Institution	New Deposits & Loans Generated by Institution provides deposit and loan details across institution for accounts opened during a specified time period
New Households	New Households provides account, household, and profit details for households opened during a specified time period
New Households and Accounts	New Households and Accounts provides daily, weekly, monthly, and year-to-date changes in new households and accounts
Number of New Households by Month	The Number of New Households by Month shows the number of new households opened last year and year-to-date.
Number of Unique Products per Household	The Number of Unique Products lists the number of different products held by the households divided by the total number of households.
Product and Service Combinations	The Product & Service Combinations provides the most common product and service combinations by all, retail, and business households
Product Combinations	The Product Combinations provides the most common product combinations by all, retail, and business households
Product Distribution of New and Lost Accounts	The Product Distribution of New and Lost Accounts provides the number and balance of accounts opened and closed in a time period
Product Summary	The Product Summary provides account, household, and profit statistics for each product and is grouped by deposits, loans, and other
Profit Percentile Analysis	The Profit Percentile Analysis report provides key statistics across the top and bottom profit percentile segments
Profit Percentile Summary	The Profit Percentile Summary give key household and profit statistics distributed across profit deciles.
Region Distribution	Region Distribution provides household and account information across regions
Retail Household Profile	The Retail Household Profile shows a high-level comparison of deposits, loans, and household composition year-to-date compared to a trailing 12-months
Services Detailed Summary by Household	The Services Detailed Summary by Household contains a summary of the services provided by the institution. Services are those features attached to product accounts and do not carry a balance.
Services Summary	The Services Summary provides the number and percentage of accounts and households per service

MARQUIS

Single Account Households by Next Product	Single Account Households by Next Product provides the household distribution by Next Product for households with only one account
Total Balance of Deposit Accounts	The Total Balance of Deposit Accounts shows the total balance of deposit accounts last year and year-to-date.
Total Balance of Loan Accounts	The Total Balance of Loan Accounts shows the total balance of loan accounts last year and year-to-date.
Total Balance of Loans and Deposits for New Households by Month	The Total Balance of Loans and Deposits for New Households shows the total balance of loan accounts and deposit accounts for new households last year and year-to-date.
Total Balance of Maturing Products	The Total Balance of Maturing Products shows the total balance of accounts maturing over the time period selected.
Total Balance of New Deposit Accounts	The Total Balance of New Deposit Accounts shows the total balance of new deposit accounts last year and year-to-date.
Total Balance of New Loan Accounts	The Total Balance of New Loan Accounts shows the total balance of new loan accounts last year and year-to-date.
Total Number of Deposit Accounts	The Total Number of Deposit Accounts shows the number of deposit accounts last year and year-to-date.
Total Number of Loan Accounts	The Total Number of Loan Accounts shows the number of loan accounts last year and year-to-date.
Total Number of Maturing Products	The Total Number of Maturing Products shows the total number of maturing accounts over the selected time period.
Total Number of New Deposit Accounts	The Total Number of New Deposit Accounts shows the total number of new deposit accounts last year and year-to-date.
Total Number of New Loan Accounts	The Total Number of New Loan Accounts shows the total number of new loan accounts last year and year-to-date.
Trending Analysis - Branches	This Trending Analysis report shows changes in households and accounts by branch over time
Trending Analysis - Products	This Trending Analysis report shows changes in households and accounts by product over time
Trending Analysis - Services	This Trending Analysis report shows changes in households and accounts by service over time
Trending Analysis - Summary	This Trending Analysis report provides a summary view of changes in households and accounts over time
Unique Product Distribution to Profit Comparison	The Unique Product Distribution to Profit Comparison shows a comparison between the number of products per household and the corresponding profit per household associated with product count.