




Quick Start Guide

In the following pages, you'll learn to customize, organize, and navigate a multitude of obligor-specific information—all in one simple-to-use platform.

Let's get started.

Dashboard

A user-created list of Obligor for organizing and quickly accessing Obligor-specific information. Create and maintain as many Dashboards as you like.



The screenshot shows the Munit dashboard interface. At the top, a header bar contains a dropdown menu labeled 'Government: State' (callout 1), a user profile icon, and a home icon (callout 2). Below the header is a toolbar with icons for favorite, share, view, notifications, settings, and filter (callout 5). The main content area is a table with columns: Obligor Name, Disclosure Filings, Official Statements, Trade Activity, and Ratings (callout 4). The table lists several Commonwealths and the District of Columbia, each with a right arrow icon in each of the four data columns. A green box highlights the table area (callout 3).

Obligor Name	Disclosure Filings	Official Statements	Trade Activity	Ratings
Commonwealth of Kentucky	→	→	→	→
Commonwealth of Massachusetts	→	→	→	→
Commonwealth of Pennsylvania	→	→	→	→
Commonwealth of Puerto Rico	→	→	→	→
Commonwealth of Virginia	→	→	→	→
District of Columbia	→	→	→	→

Navigating the Dashboard

- 1 Dashboard Selector:** displays your current Dashboard. Select from the dropdown to view other available Dashboards.
- 2 Home Dashboard:** select to view your Home Dashboard.
- 3 Create Dashboard:** select to create new custom Dashboards.
- 4 Dashboard Columns:** a custom selection of Columns shown in the selected Dashboard, which can be changed in the Dashboard Editor.

5 Dashboard Menu:

- Favorite & Home:** set a Dashboard as a Favorite or your Home Dashboard.
 - Set Access Level:** set Dashboards as Private (visible only to you) or Public (visible to other users in your organization).
 - View Dashboard:** view the selected Dashboard settings.
- OR
- Edit Dashboard:** edit the selected Dashboard.
 - Notifications:** view event Notifications for the selected Dashboard.
 - Edit Notification Settings:** set Dashboard-specific event Notification preferences to trigger automatic emails and alerts for Obligor included in Dashboard.
 - Filter List:** type in this free-text field to quickly find Obligor in the selected Dashboard.

Dashboard Editor



Build and edit customized Dashboards based on numerous filter and selection criteria.

Government: City

Dashboard Editor

Name * Government: City Owner

Obligors List Columns Sort

Search Obligors by Name

City of Philadelphia

City of Philadelphia MS
City of Philadelphia PA
City of New Philadelphia OH
New Philadelphia City School District OH
Philadelphia PA Authority For Industrial Development City Service Agreement Revenue

Advanced Obligor Search

Sectors
Government: City

States
New York Pennsylvania Massachusetts Michigan Arizona California

Counties
Add Counties to your search...

Cities
Add Cities to your search...

Debt Outstanding
500 - To \$MM

Munite Obligor
☐ Munite Obligor Only

Rating Agencies
Moody's
From - To

- 1 From the Dashboard screen, select the "+" symbol to go to the Dashboard Editor.
- 2 Enter a name for your Dashboard.
- 3 Search for and add individual Obligors by typing in a name.
OR
- 4 Select Advanced Obligor Search to search by Sector, Location, Outstanding Debt, or Ratings.
- 5 Select individual Obligors and Add Selected or Add All.
OR
- 6 Add obligors by uploading an Excel file with CUSIPs.
- 7 Save your Dashboard and continue customizing.

Search Obligors by Name

Advanced Obligor Search

Advanced Obligor Search Results

Add Selected Add All

Name	
<input checked="" type="checkbox"/> City of Anaheim CA	
<input type="checkbox"/> City of Boston MA	
<input type="checkbox"/> Town of Brookhaven NY	
<input type="checkbox"/> City of Detroit MI	
<input type="checkbox"/> City of Irvine CA	
<input type="checkbox"/> City of Los Angeles CA	

Selected Obligors (8)

Filter obligors

Remove Selected Remove All

Name	
<input type="checkbox"/> City of Anaheim CA	New
<input type="checkbox"/> City of Boston MA	
<input type="checkbox"/> City of Detroit MI	
<input type="checkbox"/> City of Irvine CA	
<input type="checkbox"/> City of Los Angeles CA	
<input type="checkbox"/> City of New York NY	
<input type="checkbox"/> Town of Oyster Bay NY	
<input type="checkbox"/> City of Philadelphia PA	

Delete Close Save As Save & Close Save

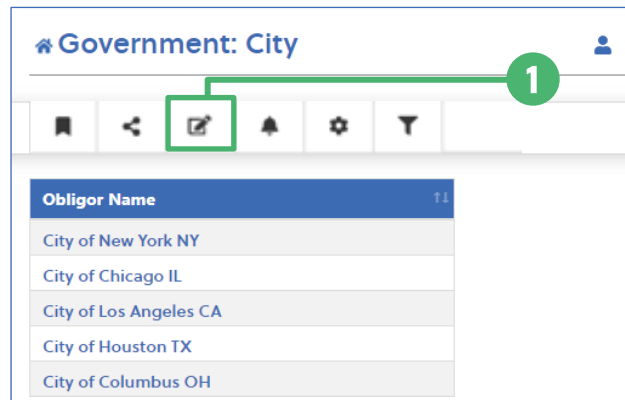
Upload CUSIPs to Find Obligors

Upload an Excel file with a list of CUSIPs (C9s or C8s) in Column A. Uploads are limited to 10,000 CUSIPs.

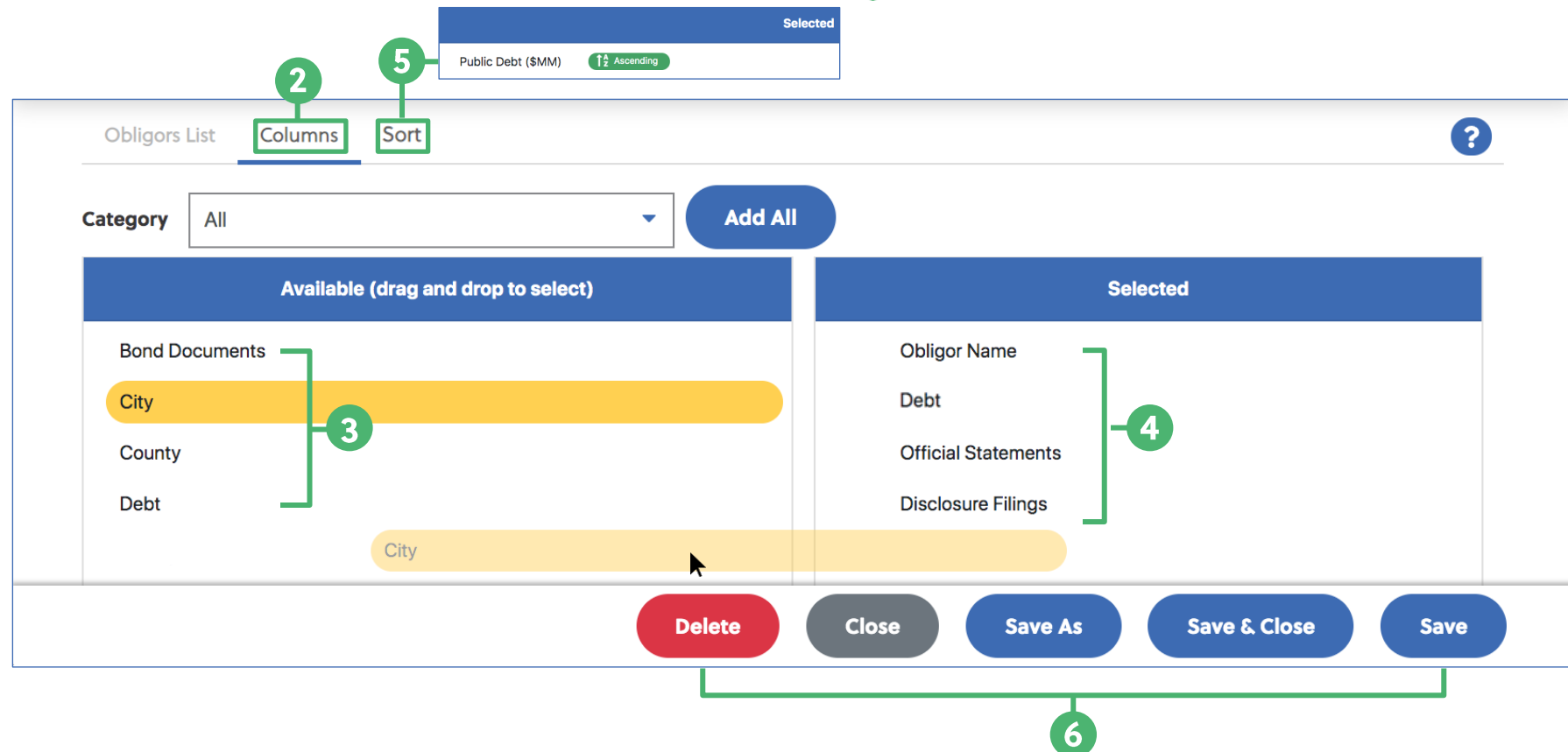
Click to browse or drop file to upload (Excel files only)

Customizing Your Dashboard

Customize your Dashboards to show numerous data fields or Obligor-module quick links within Munite.



- 1 Select Dashboard Editor.
- 2 Select Columns from the menu to see available Categories to add data as data fields or quick links in your Dashboard. Use vertical scrollbar on the right side of the page to view the full list.
- 3 Double click or drag and drop to select/remove Categories.
- 4 Once selected, drag the Category up or down to determine the Column order in the Dashboard.
- 5 Select Sort from the menu to choose a Category for sorting the Obligor in the Dashboard — then toggle between Ascending and Descending.
- 6 Select an option to save and/or close the Dashboard.



Obligor Landing Page

The one-stop shop for Obligor-specific information, data, and documents. The top row of modules are available and loaded for *every single* Obligor in the muni market. Other modules become available for Munite-subscriber Obligors only.

- 1 Select any Obligor from the Dashboard to visit their Landing Page to see an extensive range of Obligor information.
- 2 Select any of the active modules to view their contents.

Government: State

Obligor Name	Disclosure Filings	Official Statements	Trade Activity	Ratings
State of Maryland	→	→	→	→
State of Minnesota	→	→	→	→
State of North Carolina	→	→	→	→
State of Ohio	→	→	→	→

PA ★ Commonwealth of Pennsylvania
Government: State

Welcome Letter

Disclosure Filings

Official Statements

Secondary Market Trade Activity

Ratings

Fast Facts

Financial Summary

Pension & OPEB

Debt

Derivatives Summary

Public Documents

Policy & ESG Documents

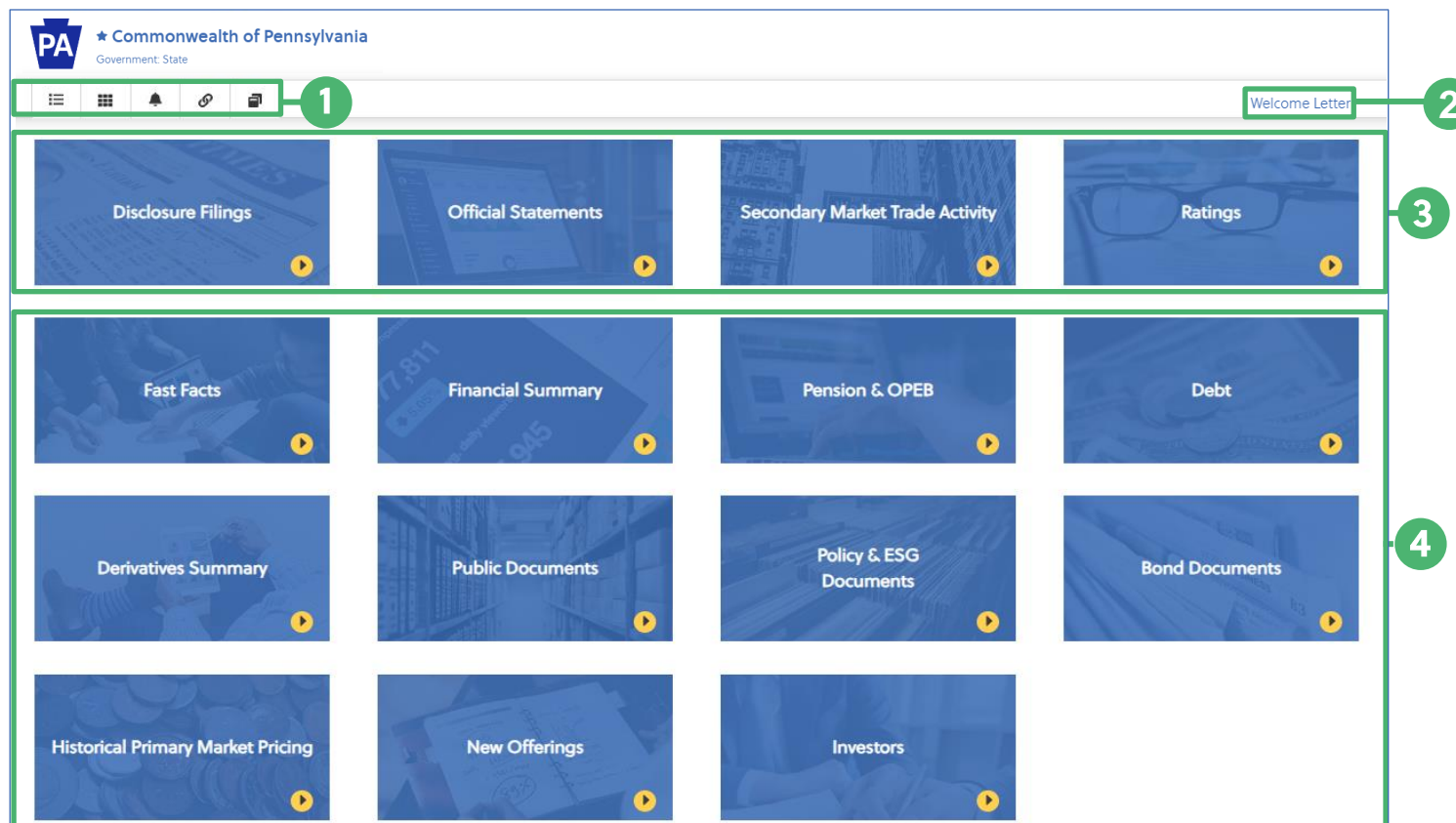
Bond Documents

Historical Primary Market Pricing






New Offerings

Investors

Navigating the Obligor Landing Page



1 Obligor Landing Page Menu:

-  **Back to Dashboard:** return to the previous Dashboard.
-  **Menu:** quick-view navigation for all Obligor Landing Page modules.
-  **Notifications:** view event Notifications for the Obligor.
-  **Links:** list of public website links for the Obligor.
-  **Related Obligor:** list of other Obligor related to the active Obligor. Obligor are linked through overlapping disclosure obligations.

- 2 Welcome Letter:** a customizable, high-level overview available for each Munit subscriber Obligor. When loaded by the Obligor, the Welcome Letter appears upon a visitor's initial arrival on a Munit subscriber's Landing Page or may be activated by users through clicking on the Welcome Letter title area.
- 3 Baseline Modules:** information modules available for every Obligor.
- 4 Premium Modules:** information modules available for Munit subscriber Obligor.



Contact us at help@munit.com | munit.com

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