BondNav
Quick Start Guide

InsperoX

Welcome to BondNav!

To login for the first time, navigate to BondNav.com in your browser. Click “forgot password” if you need assistance with your credentials.

We recommend using Google Chrome with zoom settings at 80% for the best BondNav experience.

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Platform Navigation

How do I view different security types?

From any page within BondNav, you can select security type by hovering over Market on the top navigation bar to active the dropdown menu. BondNav offers comprehensive market views of municipal bonds, corporates, Agencies, CDs, and U.S. Treasuries.

How do I search within security type to find what I am looking for?

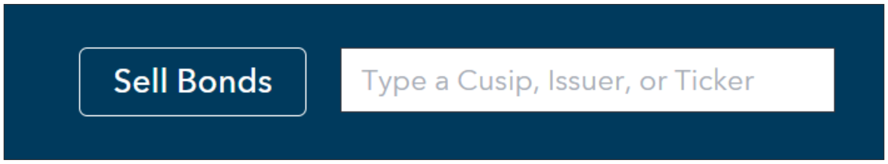
Once you have selected the security type and the trade type (Offers or Bids Wanted), you can begin to narrow down your search by selecting a combination of basic or advanced filters located to the right of the trade type drop down.

Advanced Filter Options

The advanced filter window can be pulled up by clicking on the Advanced Filters button. Here you will have the ability to pull up a list of filters to further narrow your search and find the exact bonds you are looking for.

Can I search specific a CUSIP or Issuer?

Yes, by using the search bar located on the far-right navigation bar (next to the Sell Bonds button), users can enter a specific CUSIP, Issuer, or Ticker.



User Tip
Type in a specific CUSIP, Issuer, or Ticker to generate specific results.

How do I save my search?

After generating a search, you can save your search results by following these four simple steps:

1

Navigate to the top right of the webpage and select the blue **"Save Search"** button.

2

In the side screen window that appears, select the **"Save Current Search"** button.

3

In the pop-up window, **name your search,** e.g., "CA bonds 5% maturity."

4

Select the **"Save Search"** at the bottom of the pop-up.

By default, you will be opted into a daily highlights email with curated offers matching your criteria.

How do I find similar bonds with offers?

This is easily done by clicking on the bond name in the search results. This will take you to the bond's summary page where you can scroll down to the Similar Bonds with Offers section where similar bonds may be found.

Lists and Portfolios

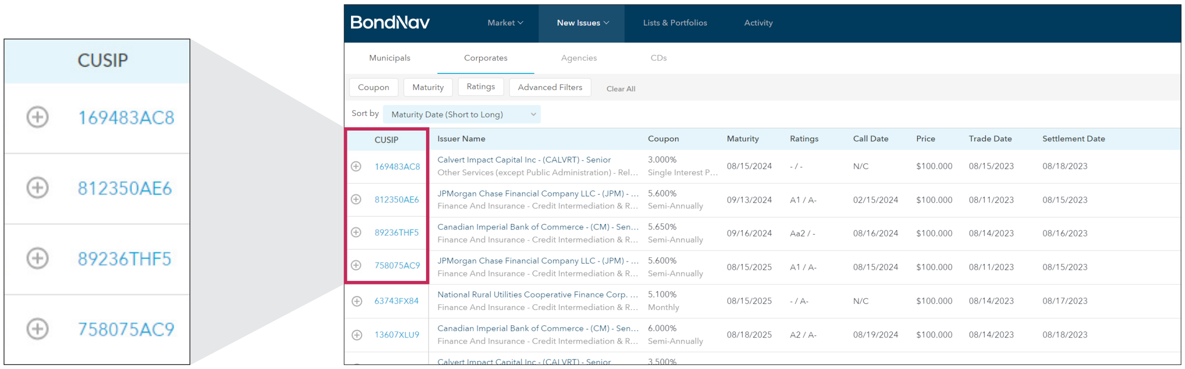
How do I create a Watchlist or Portfolio?

After clicking on Lists & Portfolios on the top navigation bar, you are presented with a screen where you can further toggle between Watchlists or Portfolios on the left side. You can create a new Watchlist or Portfolio by clicking the +New Watchlist / +New Portfolio option on the right. You may upload a portfolio in CSV file format. CUSIP, quantity, and price are required for file upload so that the cost basis can be calculated.

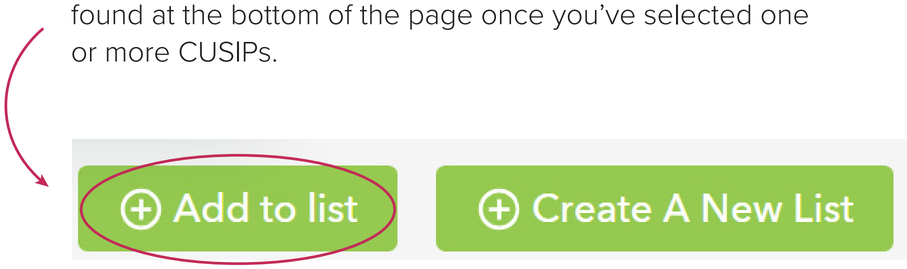
Any List or Portfolio that you create is private. No one can see the details of what you have created unless you select to “Share” the List or Portfolio with someone else.

How do I add CUSIPs to a watchlist or portfolio?

To add more than one CUSIP to a Watchlist you can click on the checkbox to the left of the + symbol. Once you finish selecting your CUSIPs you can add them to a watchlist by clicking on the green **Add to List** at the bottom of your screen and selecting the desired watchlist.



From a CUSIPs detail page, the **Add to List** button can be found at the bottom of the page once you’ve selected one or more CUSIPs.



Can I share Watchlists and Portfolios with other users?

Yes, you can share a list with colleagues within your same firm.

1. Navigate to **Lists & Portfolios** on the top blue banner.
2. Select the **Watchlist** or **Portfolio** tab and click on a list.
3. Once the list has loaded, navigate to the top-right area outside of the table, and click on the **Share** button. A Watchlist/Portfolio Share settings window will appear, and you can enter the name of the person you want to share with. Decide if they can *view* or *edit* your List or Portfolio.
4. Click **Save.**

How do I create alerts?

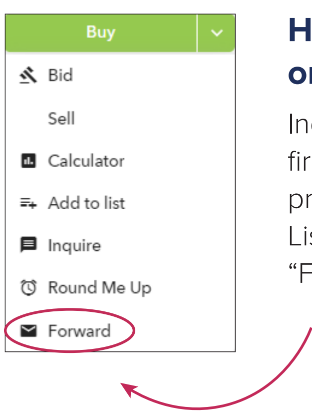
For any List or Portfolio that is created, click into the specific item, or even on the indexed list; there is a bell icon on the right side. Click on the icon and you will be presented with a pop-up action box:

You have the option to select any of the 3 ALERT types:

Offerings

Bid Wanteds

Rating Changes



How do I forward a bond or list of bonds to a client or prospect?

Individual bond details or a list of bonds can be sent as an email, first to you, and then you can forward them on to your client or prospect to review. Whether from the bond detail page or from a List or Portfolio, click on the green action button and select "Forward." The email will be received within a few minutes.

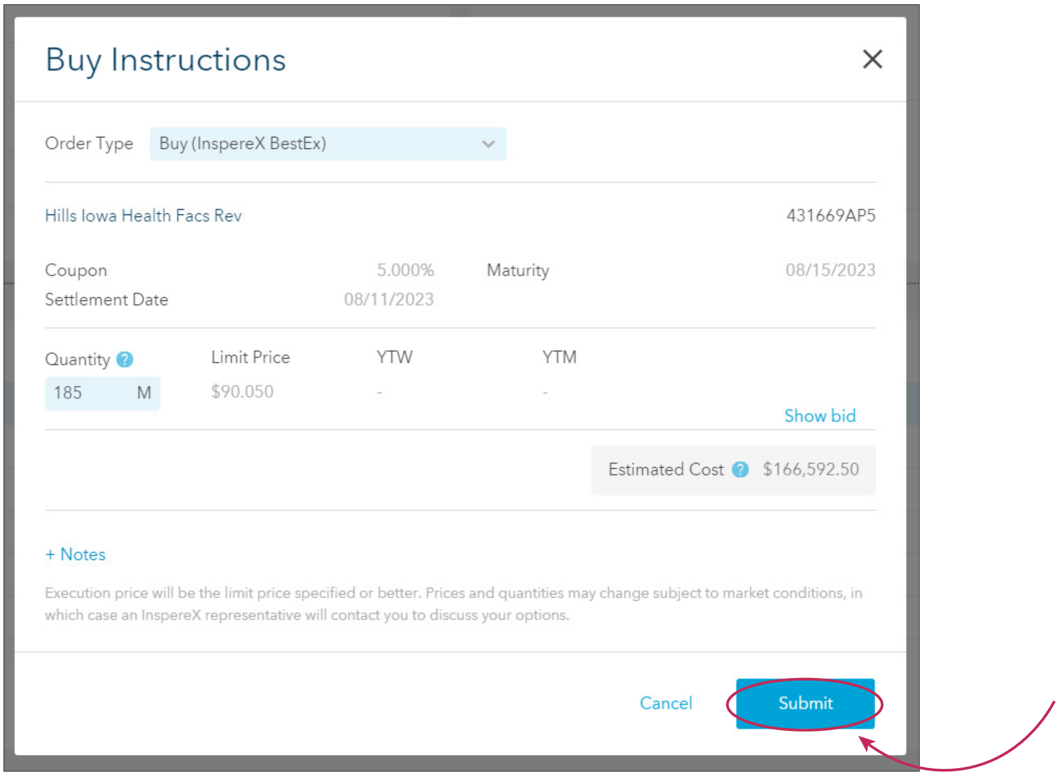
Trading Workflow

Notes Field
The Buy Instructions notes field is reserved for information pertinent to your trading desk or InspereX's desk. Please do not make allocations in the notes field.

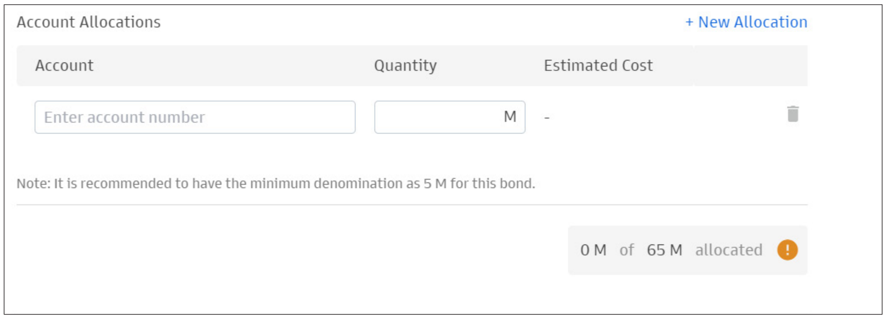
How do I place an order?

Once you have found an opportunity and you are ready to place an order, clicking the **Buy** button will initiate the order process and deploy the **Buy Instructions** pop-up window.

After filling out the necessary details within the Buy Instructions window, you will need to click the **Submit** button.

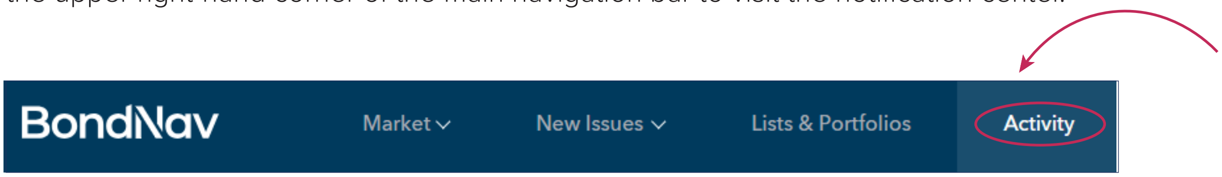


If your firm has the ability to pre-allocate orders, an allocation module will appear within the Buy Instructions order window. You will need to enter the account number into the appropriate fields before submitting your order.



How do I check on my order status?

You can check the status of an order submitted by looking within the **Activity** menu under Trades, then Active Trades. You will be notified through email when an order is submitted and when it has a status change. You can also click on the bell icon located in the upper right-hand corner of the main navigation bar to visit the notification center.



How do I revise or cancel an order?

Give us a call to make changes to your order: Call our desk at 646-661-1700 or contact your **sales/liaison contact** directly.

How do I see my historical trades?

All active trades and historical trade activity can be found in BondNav under **Activity** on the top navigation menu.

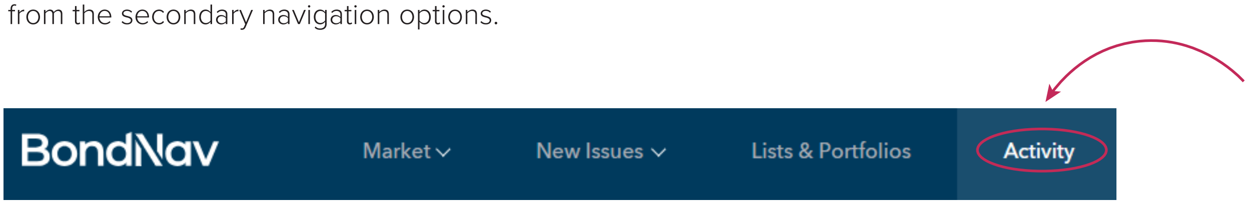
How will I know if I have received a bid on a bond I am selling?

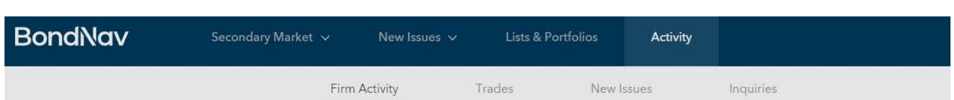
If you have received a bid on a bond you are selling, you will receive an email communication from the BondNav platform, as well as having that inquiry show up within the **Activity** menu under **Inquiries** and **Active Trades.** You will also be alerted to status changes within the notification center which can be accessed by clicking on the bell icon in the upper-right hand corner of the main navigation bar.

How do I Export Compliance Reports in BondNav?

Note: Only users with Compliance permissions can access their firm's trade blotter.

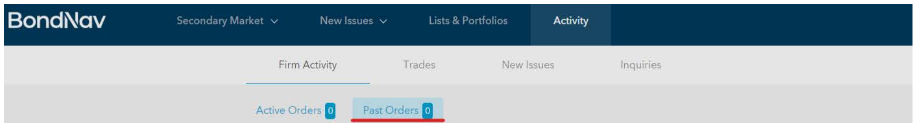
Select the **Activity** tab from the top navigation bar options. Then select **Firm Activity** from the secondary navigation options.

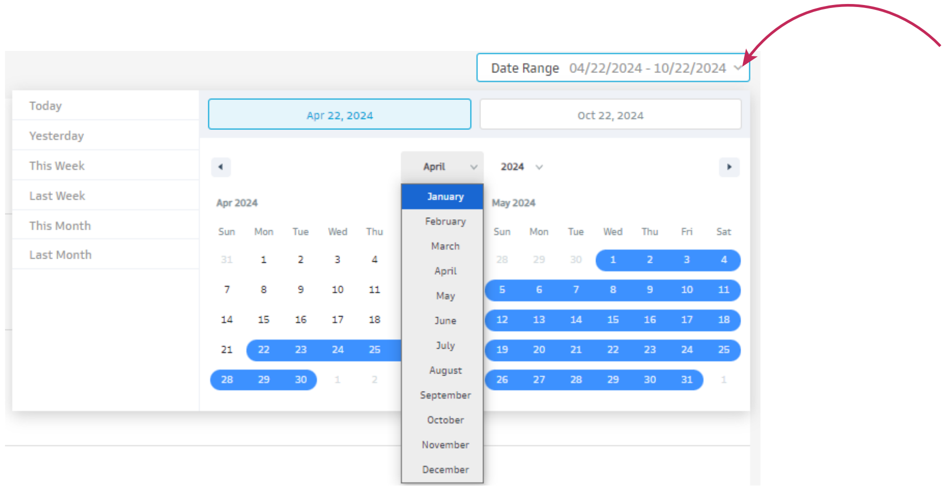




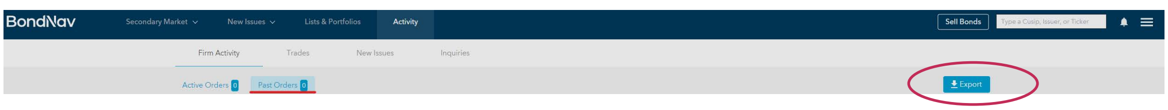
Under **Firm Activity**, navigate to the **All Past Orders** tab.

To view past orders from a specific date range, click on the date range filter on the right hand side of the screen. Select the month(s), date(s), and year(s) to view the orders for that range.

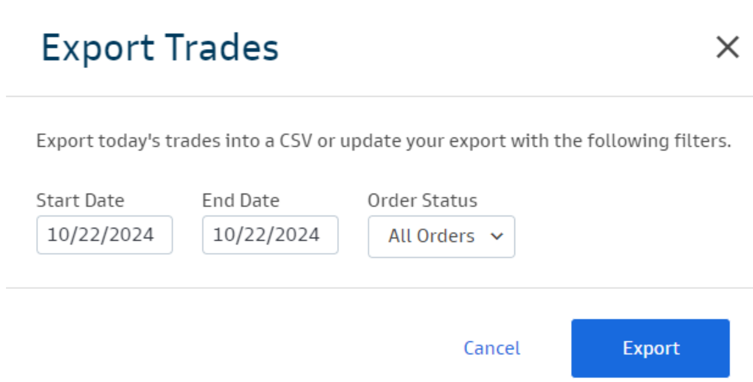




To export your orders, select the **Export** button.



From the **Export Trades** screen, filter by **Start Date** and **End Date**, then select the **Order Status** type.



To finalize your export, click on the **Export** button.

Help & Technical Support

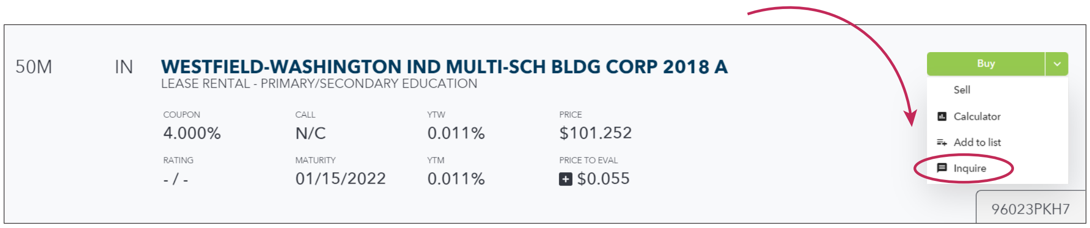
Can I open BondNav in multiple windows/browsers?

Yes, you have the ability to open multiple windows and/or browsers on BondNav. To do so, hover over the desired icon or text, right click your mouse and either select **“Open link in tab”** or **“Open link in new window”**

How do I contact the trading desk with trade questions?

Get in touch with the BondNav team in one of two ways:

1. Inquire with our traders: Submit an inquiry for a particular CUSIP. For any given CUSIP, navigate to the “green action button,” select the drop-down arrow, and then select **“Inquire.”**



2. Call the **Liaison Desk** for Trade Support: 646-661-1700

How do I ask questions about BondNav features and functionality?

You can chat with the BondNav team to get help on navigating and using BondNav! On the top right corner of the page, in the dark blue banner, click on the **“Need Help?”** Icon. Type in your question and a representative will be with you shortly.