

JPMorgan

JPMorgan utilized Panopticon's interactive Treemap visualization tools to create their highly intuitive CreditMap application. The tool is well-accepted by customers and has helped JPMorgan improve its customer retention rates.

Overview

Fixed income research and analytics providers are looking at new means of visualizing data to provide more valuable and intuitive services to their users by going beyond simple online tables, charts and document repositories.

JPMorgan created their CreditMap application using Panopticon Developer, our comprehensive SDK, in order to provide their customers with a graphical representation of real-time activity in the corporate bond market. JPMorgan blurred the lines between providing informative research and valuable analytics which has enabled them to win the *Euromoney* award for "Best Online Fixed Income Research".

Before CreditMap, the brokerage firm's customers could read text reports on the corporate bond market and view various tables of statistical information. But the market is so extensive that it could be difficult to keep things in perspective or to be aware of many of the investment opportunities.

JPMorgan's CreditMap allows users to visualize information through the use of color, size and proximity in any way they desire with an easily customizable interface. This interface acts as a catalyst enabling users to recognize patterns, analyze information and make decisions more quickly and more accurately than ever before.



CreditMap presents the corporate bond universe as a quilt of rectangles on a computer screen. The quilt is divided into industry sectors, and the rectangles within each sector represent bond issues. The size of the rectangle indicates the size of the issue, and the color indicates the issue's performance. So at a glance, investors can see which sectors and which individual issues are hot, and whether an issue's size fits their investment needs. Clicking on a rectangle opens a window that gives basic information on the issue — including its ratings and the name and phone number of the analyst who covers the issue — along with a drop-down menu offering detailed research.

"Panopticon treemaps have greatly enhanced our users' ability to visualize the credit markets and utilize analytics – it is an important contributing factor to us winning the *Euromoney* award."

Lee McGinty
Head of European Portfolio & Index Strategy
JPMorgan

The Challenge

Visualizing and understanding vast quantities of credit market data can be overwhelming using traditional techniques such as charts and tables. Navigating through this data to find specific reports and analytical information can also prove daunting and traditional information delivery mechanisms have tended to provide unruly volumes of data. The Internet is today the obvious delivery mechanism for such market data and proprietary analyses, yet the providers of such services must deliver more intuitive visualization and navigation to provide better value to their customers.

Fixed income research and analysis providers aim to achieve the following to enhance customer experience:

- Differentiate their service in a competitive and constantly evolving market
- Derive new delivery mechanisms to reduce information overload
- Derive new ways to present information that are more intuitive
- Provide user-customizable tools offering better navigation and data visualization

The Solution

JPMorgan was able to provide their users with quicker access to their existing online information using new visualization and navigation tools. To do this they implemented Panopticon's interactive treemap visualization as a presentation layer and navigation system that provides a bird's eye view of the data at the same time allowing the user to drill-down to specific reports and analytics.

JPMorgan's CreditMap allows users to:

- Visualize developments in the markets, or market segments in a single view
- Configure views to see the information they need
- Drill-down to individual reports, analyses and information
- Make better informed decisions more quickly
- Recognize new patterns and trends

Improved Market Position and Customer Retention

JPMorgan has been delighted with the results of improving their online fixed income research service and continue to be recognized as the market leader as a result. There was very little risk involved when implementing the technology and the implementation went very quickly. JPMorgan was able to dramatically increase market awareness through the recognition they received by winning the *Euromoney* award for their site and continue to use the CreditMap as a means to demonstrate the value of their services.

With this project, JPMorgan achieved:

- Fast, efficient implementation of compelling new technology
- Better customer relationships and stronger retention
- Maintenance of their position as the market leader
- Increased market awareness of their services

More Information

For more information about how you can utilize Panopticon visual business intelligence tools in your firm, contact:

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