

ARCHIVED PEER UPDATES

Version 2.0.11 & 3.0.1 Changes

- September (3Q) 2010 data is available

Version 2.0.10.2 Changes

- Enabled FirstLook updates

Version 2.0.10 Changes

- June (2Q) 2010 data is available

Version 2.0.82 Changes

- Fixed Net Interest Margin calculation
- Fixed State Totals report
- Disabled the CUSO Each CU Invests Report
- Fixed ROM scoring output
- Fixed small error messages

Version 2.0.8 Changes

- December 2009 data is available

Version 2.0.74 Changes

- FirstLook pop-up message fixed

Version 2.0.71 Changes

- Enabled FirstLook updates for 4Q 2009

Version 2.0.7 Changes

- September 2009 data is available
- Data Load: Includes header updates and data updates

Version 2.0.6.94 Changes

- Implemented Auto Updates to the application

Version 2.0.6.92 Changes

- Updated ROA and ROE formula to use the a661a account code as done so by NCUA

Version 2.0.6.6 Changes

- Copy feature in the Alpha and Leader reports copies the AVG and Total results
- Saving a Custom Display error has been fixed
- < \$2M peer group count is fixed
- New Added capability to the update process. All custom displays and custom peer groups are now backed up before installing any program updates.

Version 2.0.6.4 Changes

- New Access the Formula Wizard to search or reference account codes and formulas in the

"Tools" section of the program

- New Added search tool when changing primary credit union
- Updated ROE formula to include the A311 account code

Version 2.0.6.3 Changes

- Added the following vendor partners: Mobile Banking, RDC, Prepaid Cards and 3rd Party Mutual Fund Provider
- The following custom graph types work properly: State Map and State Totals
- Increased the size of the My Displays window to see the full title of custom displays
- Ability to export charter numbers WITHOUT commas for easy re-importing peer groups
- Shifted the Excel and PowerPoint buttons on top of each chart with more related buttons
- The following charter type shortcuts now work independently from each other : "charter type" and "charter type 2." The "charter type" shortcut provides abbreviations such as "FCU" and "CU"
- Resized the Formula Wizard description column to see the full formula description
- New Regulator Edition of Peer to Peer 2.0 - the "Select Your Report or Graph" drop down menu includes the "Regulator Analysis" section
- New Added pre-built Asset Growth chart under the "Strategic Planning" folder in the "Key Ratios" section
- The drop down menu when changing credit unions in the Standing custom graph type now formats as an alphabetical listing, rather than assets
- The pre-built 2 Year Report is revised for 20084 data; this only works once you download the revised 20084 data through a manual update
- New Added ROA formula from the NCUA as $\text{Annual(a661a)/ave_assets}$
- Pre-built pie charts are now showing correct peer data and refreshes with new data when changing cycles

Version 2.0.6.1 Changes

- 2Q 2009 data release

Version 2.0.5.7 Changes

- Preliminary 2Q 2009 data now available through First Look

Version 2.0.5.5 Changes

- New Added the formula ROA2 (ROA before NCUSIF expense) and added a prebuilt report for it under key ratios
- Vendor updates from internal Technology Partner Report
- Some revised 5300s from 4Q 2008 have been updated

Version 2.0.5.4 Changes

- Now allows you to sort credit unions in peer group creation by ROA, OPEX, and Net Interest Margin
- Fixed 800 number data
- ROA and ROE formulas have changed
- Risk based net worth formula has been fixed

Version 2.0.5.3 Changes

- New Added pre-built 'Efficiency' folder under the 'Key Ratios' section
- Properly formats "Telephone" data
- NCUA Region data updated
- Activation Screen Text Change
- Resolved issues with "Operating Expense Growth" prebuilt display
- Re-populated vendor data

Version 2.0.5.2 Changes

- Resolves issues with standing report
- Folder names no longer effect pre-built folders
- Editing built in chart improved

Version 2.0.5.15 Changes

- ROE equation updated
- Updates the charter type for some Cus
- Adds formula for A769A1 and A769B1
- Fixes geographic peer creation screen

Version 2.0.5 Changes

- 1Q 2009 data release

Version 2.0.4.98 Changes

- Account codes for CUSO data now work
- Created a new pre-built display for Yield on Average Investment; formula shortcut is "yield+gn/la on average investment"
- Formula update for Yield on Earning Assets and Asset Composition
- Updated the title of the graph on the sidebar "Real GDP due to Personal Consumption YOY Change" to match the title of the graph itself "Real GDP YOY Change"
- Can use account codes A830A and A876

Version 2.0.4.95 Changes

- Benchd formula fixed
- Cost of Funds vs. Market Rate Report fixed
- .25, .5, .75 formula shortcuts for ROA fixed
- Header data added to 2-Year Report

Version 2.0.4.9 Changes

- Ability to sort by CDS ID in any report
- Updated Financial Comparison reports erroring out due to dropping of a580 and a584
- Updated charter type for three CUs
- Fixed CUSO report from erroring out
- Updated all built-in peer groups to have the correct historical data when using 20084 cycle
- Formula updates for net_income, etc...
- Growth function fixed when going from negative value to another negative value.

Version 2.0.4.8 Changes

- First Look program setup

- Peers' tab added in the Historical Line Chart custom display, reporting on all the individual credit unions in your peer group(s)

Version 2.0.4.7 Changes

- Progress bar of updates can be put behind other applications. It no longer is locked on top of everything else
- Editing a chart from a built-in display into a custom display now has the same data that is on the built-in display
- Ability to add more than 15 formulas when creating custom display with access to the formula wizard
- New built-in display that looks at the Efficiency Ratio before Provision for Loan Losses

Version 2.0.4.5 Changes

- Map in Custom Build Peer Group creation colors correctly based on selections
- Vendors no longer double listed in Custom Build Peer Group creation process, in the Vendor tab
- Descriptions added in search feature of the Formula Wizard

Version 2.0.4.4 Changes

- Display Frequency settings alters graph and X-axis correctly
- ROA and ROI growth #s corrected
- Custom reports no longer incorrectly adds up percentages for "Total Value" at bottom--- now it's just blank
- Titles on edit of built-in display is now centered
- When creating a custom peer group, using the Custom Build process, the preview for any group filtered by ratios now matches the data in the list when you save the group
- Graph corrected when exporting ROA to Excel
- Resizing of columns stays when you resort
- New vs. Used Auto Loan Growth display corrected

Version 2.0.4.3 Changes

- Custom display folder and chart names can now have apostrophes (') in them
- When importing many charts with the same name, it will no longer add a bunch of 1's at the end. Rather, it will add _v#; # represents the iteration that display with the same name showed up during imports
- Users can now sort by Charter number correctly
- New SPLASH screen when starting the application

Version 2.0.4.2 Changes

- Auto scroll feature added when organizing custom displays under File --> My Displays
- New data points added: NCUA Region, charter date
- Telephone numbers listed in the correct format
- ROA and ROI growth numbers corrected
- Looking back 1 year using :1 feature for ROA and ROE fixed

Version 2.0.4.1 Changes

- Copy to clipboard function added to export data to Excel

- In the Custom Build for peer group creation, using the formula wizard doesn't overwrite other criteria

Version 2.0.4 Changes

- 4Q data load
- Vendor updates: (1) Internet Banking provider, (2) estatement provider, (3) the debit card signature, (4) debit card PIN processor added to "Technology Partners Report" under Performance Reports
- Stacked area charts annualized correctly
- Custom Peer Group by FOM corrected

Version 2.0.3.95 Changes

- # of CUs in All U.S. display correctly
- CDS ID, TOM_Code and CountyName added as accepted formulas
- ROA corrected in 5 Year FPR and 2 Year Financial Comparison
- ROM in custom reports corrected

Version 2.0.3.8 Changes

- Added description to section of RSS Feed
- Corrected the CUPP Reports: Summary for Credit Union, Asset Quality Report, Capital Adequacy Report, Earning and Operations Report, and Liquidity Report

Version 2.0.3.6 Changes

- Search function installed in Formula Wizard
- Duplicate text removed from Formula Wizard
- Data for investments corrected
- Yield on Investments data in 2 Year Financial Comparison fixed
- Account code A100 data fixed for 3Q 2008
- Updates account code A618a for Security Services

Version 2.0.3.2 Changes

- First Look data for 4Q 2008
- Recognition of the shortcut "Investments" in Peer 2 formulas and displays
- Status bar during creation of custom peer groups
- Ability to create new folders in custom displays from the My Displays window
- Alphabetical organization of custom display folders and graphs
- Credit Card Processor data available in Technology Report
- Data update of account code a879a - indirect lending

Version 2.0.3 Changes

- Looking back quarters using :.5 and :.75 shortcut is available
- Pulling aAverage a993/members (CC penetration) for a group of credit unions
- Formula line and title headings are now fixed when creating a custom display
- Issues with the Ranking Report under Performance Reports
- Economic data charts now shows most current data
- Update available notification when the program is opened
- Update to import charter numbers

- 4 fixes for ROM
- Net Income = a661a instead of (A395-a380-a381-a340)
- Update net_int_margin = (Annual(int_Income-a380-a381-a340)/ave_Assets) instead of (Annual(int_Income-a380-a381-a340)/ave_Assets)*100
- Total Assets Fix
- Econometric data updates
- First Cheyenne data updates 20074, 20081, 20082
- Update a455
- Update a799i
- Formula updates
- Update a704C1
- Header data
- Multiple Vendor updates
- Database program version tracker

Version 2.0.2 Changes

- 3Q 2008 dataload
- Updates to the 5300 call report form

Version 2.0.1 Changes

- Fixed issue with downloading First Look data
- Fixed issue with detecting proxy servers on install
- Fixed custom chart import function where the formula "peer(" is present
- Fixed issue with importing a peer group from a list of charter numbers
- Fixed issue with editing the title of custom reports

Version 2.0.0.53

- Initial release