

## Zacks Total Return Performance Graph Compliance System Support

### Step 1

- Select your payment option on the splash page screen.
  - Selecting the Bill Me Later option will take you to a login screen with our phone number. Please call us to get a login and password.
  - Selecting the Pay by Credit Card option will take you directly to the system. At the end of the process you will be required to provide your contact information and to your our credit card payment system prior to downloading your graph.
  - Click on “Proceed”

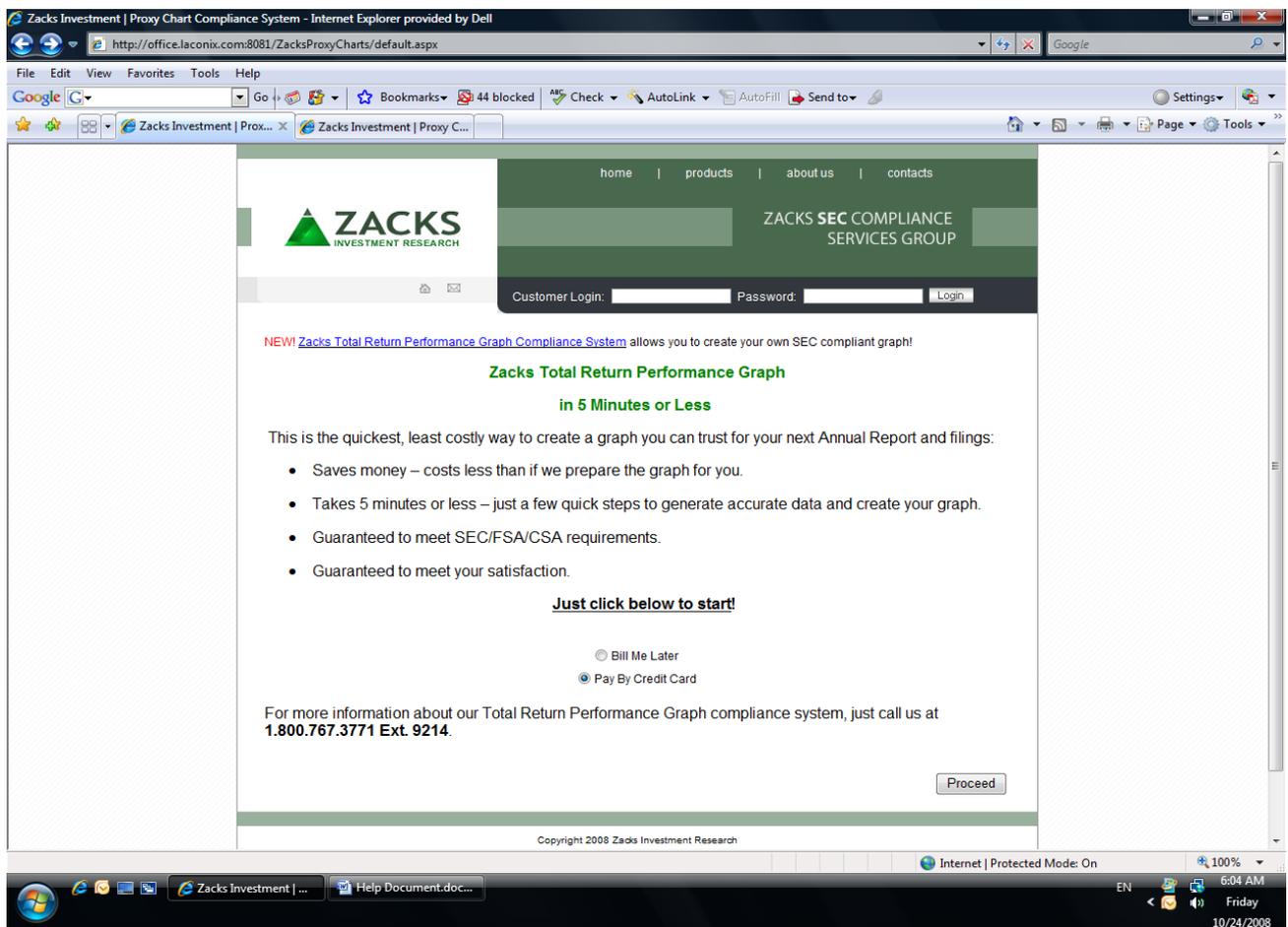


Figure 1

NOTE: If the “Bill Me Later” option is chosen, an email address and password will be needed to access the total return stock performance graph creating software. Please refer to Figure 5.

- 1) Type the ticker of the desired company in the empty field below and click on “Find Ticker.” (If the ticker is not found, please contact us at [zspp@zacks.com](mailto:zspp@zacks.com) or call 312-265-9214 for customer support). Please refer to Figure 2.

- 2) The Fiscal Year End (FYE) of the company for which the ticker was chosen will automatically be selected along with the last 5 years necessary to make a current 5 year graph. However, if the correct FYE is not selected or a different FYE is desired, please select the desired FYE month from the pull down box. If a different time frame for a graph is desired (e.g., less than 5 years), please select the start and end year desired for the graph from the appropriate pull down menu. Please refer to Figure 2.

- 3) Click on "Proceed" to go on to Step 2. Please refer to Figure 2.

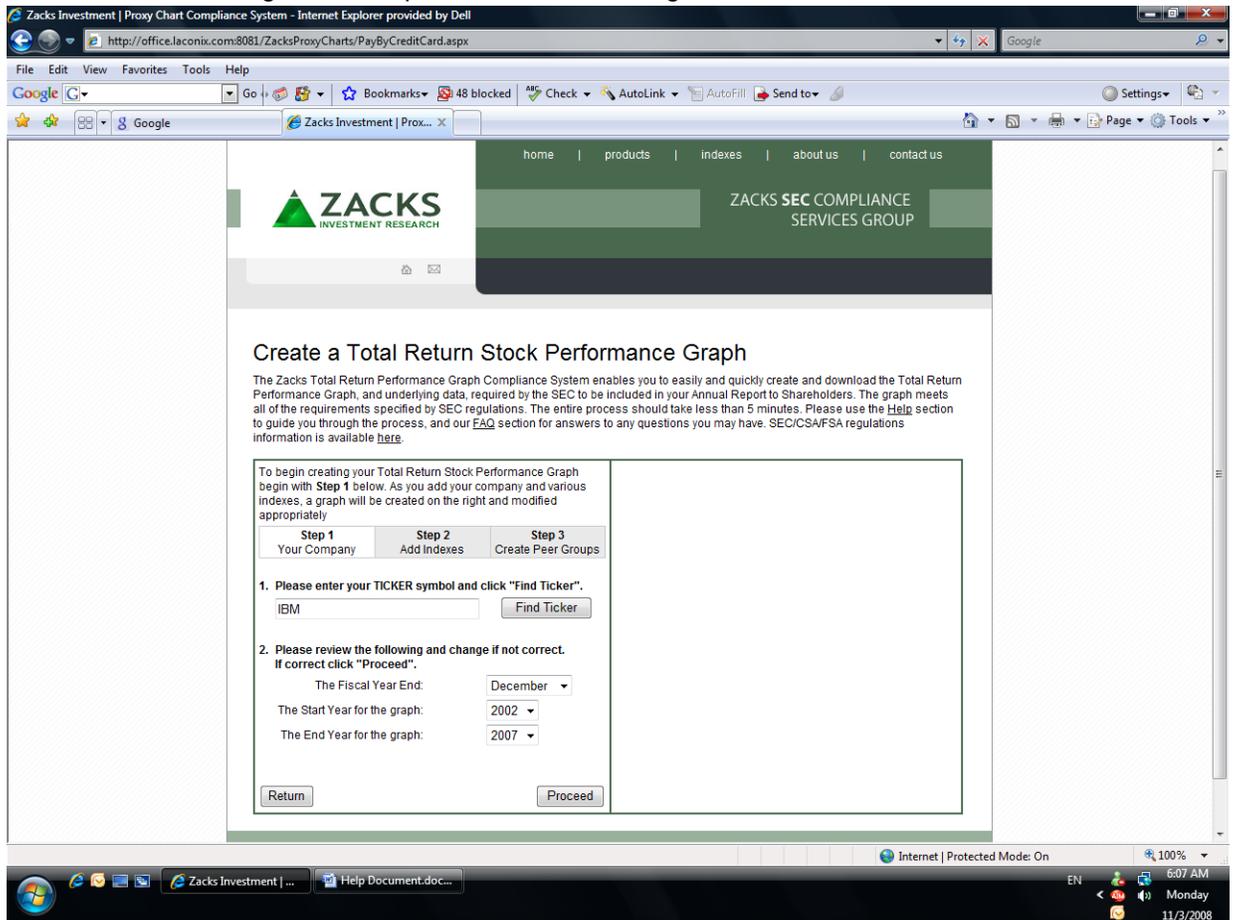


Figure 2

## Step2

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### Create a Total Return Stock Performance Graph

Step 2 in creating your Total Return Performance Graph is to select the appropriate indexes to use as comparisons.

**Step 1** Your Company | **Step 2** Add Indexes | **Step 3** Create Peer Groups

**Standard Indexes**  
To add an index, find the desired index on the pull-down menu, click on it, and then click on "Add Index".  
Amex Biotechnology Index

**Indexes based on SIC Codes**  
To add an index derived from the returns of the members of SIC Code Groups, find the desired index on the pull-down menu, click on it, and then click on "Add SIC Code".  
100 - Agricultural Production-Crops

Once you have added the indexes please click "Proceed".

**Comparison of 5 Year Cumulative Total Return (Assumes Initial Investment of \$100)**

Year	Total Return
Initial	100.00
2003	110.16
2004	128.52
2005	91.80
2006	73.44
2007	146.88

Index Name  
INTL BUS MACH

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Figure 3

- 1) Select the desired index from the pull down menu and then click on "Add Index". (If the desired index is added successfully, a prompt will appear under "Create a Total Return Stock Performance Graph" indicating that the index was added successfully. In addition, the index chosen from the pull down menu will appear on the right side of the screen under the graph, Please refer to Figure 3.1). If no other Index or SIC Code will be added, please continue to Step 3.

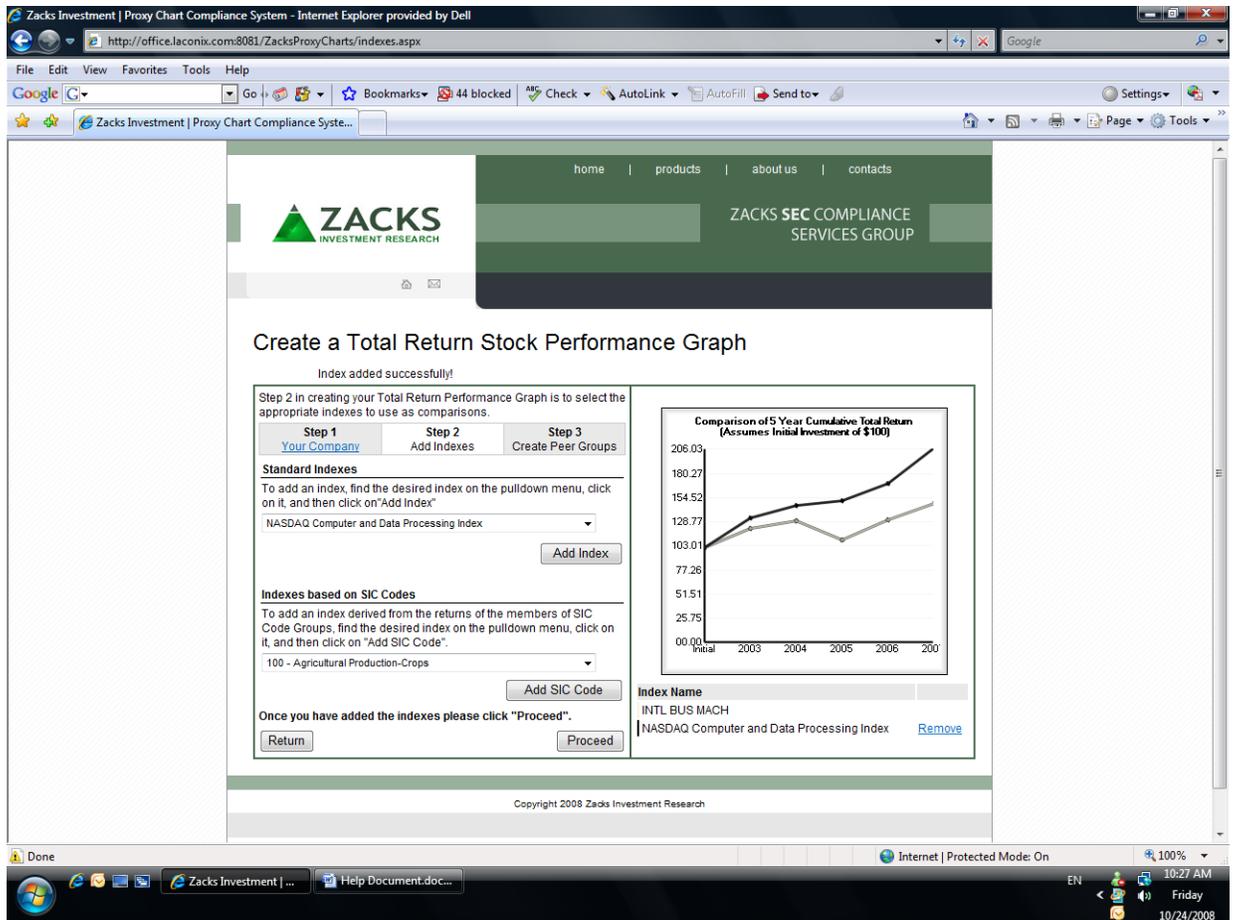


Figure 3.1

- 2) SIC codes can also be used as indices by selecting the desired SIC code(s) from the pull down menu and clicking on "Add SIC Code." (If the desired SIC Code is added successfully, a prompt will appear under "Create a Total Return Stock Performance Graph" indicating that the SIC Code was added successfully. The SIC Code which was selected from the pull down menu will appear under the sample graph on the right side of the screen). Please refer to Figure 3.2.

NOTE: Some indices will require additional payment in order to be used on the performance graph. The fee for these indexes will appear on the screen prior to the payment screen when using the "pay by credit card" option, and on the screen prior to the download graph screen when using the "bill me later" option

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http://office.laconix.com:8081/ZacksProxyCharts/indexes.aspx

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### Create a Total Return Stock Performance Graph

SIC Code Group added successfully!

Step 2 in creating your Total Return Performance Graph is to select the appropriate indexes to use as comparisons.

**Step 1** Your Company    **Step 2** Add Indexes    **Step 3** Create Peer Groups

**Standard Indexes**

To add an index, find the desired index on the pulldown menu, click on it, and then click on "Add Index"

NASDAQ Computer and Data Processing Index

**Indexes based on SIC Codes**

To add an index derived from the returns of the members of SIC Code Groups, find the desired index on the pulldown menu, click on it, and then click on "Add SIC Code"

3577 - Computer Peripheral Equipment, NEC

Once you have added the indexes please click "Proceed".

**Comparison of 5 Year Cumulative Total Return (Assumes Initial Investment of \$100)**

Year	INTL BUS MACH	NASDAQ Computer and Data Processing Index	3577 - Computer Peripheral Equipment, NEC
Initial	100.00	100.00	100.00
2003	180.27	128.77	77.26
2004	180.27	154.52	103.01
2005	180.27	128.77	77.26
2006	206.03	154.52	103.01
2007	180.27	128.77	77.26

Index Name

INTL BUS MACH

NASDAQ Computer and Data Processing Index [Remove](#)

3577 - Computer Peripheral Equipment, NEC [3577] [Remove](#)

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Figure 3.2

- 3) Click on "Proceed" to continue to Step 3



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### Create a Total Return Stock Performance Graph

[There was a problem retrieving data for the selected ticker. Please Call 1-312-265-9214 for assistance](#)

The third step is to create the relevant Peer Groups. A Peer Group is a collection of returns of publicly traded companies or SIC codes that will be used as a comparison to your returns. You can also select an appropriate Industry Index as your Peer Group. To do this, go back to Step 2 "Add Indexes" and add the selected Index to your graph.

Step 1 [Your Company](#) Step 2 [Add Indexes](#) Step 3 Create Peer Groups

**Peer Group**

Peer Group Name:

Use:  Stock Tickers  SIC Codes

**Peer Group Members:**  
 Enter a single ticker in the box below and click on "Add Ticker". Continue adding individual tickers until you have entered all the tickers for your peer group. Give your peer group a name in the box above and then click on "Create Peer Group".

Ticker	Company
	PMVF

Add Member:

[Manually enter data about this ticker](#)

Forgot the ticker? Click [here](#).

After entering your peer group, click "Create Peer Group", and then click "Proceed".

**Index Name**

INTL BUS MACH

NASDAQ Computer and Data Processing Index [Remove](#)

3577 - Computer Peripheral Equipment, NEC [3577] [Remove](#)

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Figure 4.1

Please contact us at [zssp@zacks.com](mailto:zssp@zacks.com) or call 312-265-9214 for customer support.

- 4) a) If the desired P.G. chosen is to be composed of SIC Codes, make sure the circle to the left of "SIC Codes" is darkened to select your choice. Once this is done a list of SIC Codes will appear under P.G. members and a range of SIC Codes can be chosen from there. To select one SIC code simply look for the desired SIC code, click on it, click on "Create Peer Group," and then click on "Proceed" to continue on to **Step 4**. Please refer to Figure 4.2.

The screenshot displays the Zacks Investment Research website interface for creating a Total Return Stock Performance Graph. The page is titled "Create a Total Return Stock Performance Graph" and includes a navigation menu with links for "home", "products", "about us", and "contacts". A login section for "ZACKS SEC COMPLIANCE SERVICES GROUP" is visible, with fields for "Customer Login:" and "Password:" and a "Login" button.

The main content area is divided into three steps:
 

- Step 1: Your Company** (highlighted in blue)
- Step 2: Add Indexes** (highlighted in blue)
- Step 3: Create Peer Groups**

The "Peer Group" section includes a "Peer Group Name:" field and a "Use:" section with radio buttons for "Stock Tickers" and "SIC Code" (selected). Below this is a list of SIC codes:
 

- 100 - Agricultural Production-Crops
- 200 - Agricultural Prod-Livestock & Animal Specialties
- 700 - Agricultural Services
- 800 - Forestry
- 900 - Fishing, Hunting and Trapping
- 1000 - Metal Mining
- 1040 - Gold and Silver Ores
- 1090 - Miscellaneous Metal Ores
- 1221 - Bituminous Coal & Lignite Mining
- 1311 - Crude Petroleum & Natural Gas

To the right, a line chart titled "Comparison of 5 Year Cumulative Total Return (Assumes Initial Investment of \$100)" shows performance from 2003 to 2007. The Y-axis ranges from 00.00 to 206.03. Three lines represent different peer groups, with the highest line ending at approximately 206.03 in 2007.

Below the chart, the "Index Name" section lists:
 

- INTL BUS MACH
- NASDAQ Computer and Data Processing Index (Remove)
- 3577 - Computer Peripheral Equipment, NEC (3577) (Remove)

The bottom of the screenshot shows the Windows taskbar with the system clock at 11:16 AM on Friday, 10/24/2008, and the Internet Explorer status bar indicating "Protected Mode: On".

Figure 4.2

b) If the SIC Codes that are to be used as P.G. members are from a continuous range (e.g. SIC Codes from the range 700-1040), click on the SIC Code with the lowest numerical value, hold down the shift button, and finally select the SIC Code with the highest numerical value and this will select the entire continuous SIC Code range. Click on "Create Peer Group" and then on "Proceed" to continue on to Step 4. Please refer to Figure 4.3.

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http://office.laconix.com:8081/ZacksProxyCharts/peergroups.aspx

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Customer Login:  Password:  Login

### Create a Total Return Stock Performance Graph

The third step is to create the relevant Peer Groups. A Peer Group is a collection of returns of publicly traded companies or SIC codes that will be used as a comparison to your returns. You can also select an appropriate Industry Index as your Peer Group. To do this, go back to Step 2 "Add Indexes" and add the selected Index to your graph.

**Step 1** [Your Company](#) **Step 2** [Add Indexes](#) **Step 3** [Create Peer Groups](#)

**Peer Group**

Peer Group Name:

Use:  Stock Tickers  SIC Codes

**Peer Group Members:**  
Select any SIC codes below that you would like to base your index on. Give your peer group a name in the box above and then click "Create Peer Group".

- 100 - Agricultural Production-Crops
- 200 - Agricultural Prod-Livestock & Animal Specialties
- 700 - Agricultural Services
- 800 - Forestry
- 900 - Fishing, Hunting and Trapping
- 1000 - Metal Mining
- 1040 - Gold and Silver Ores
- 1090 - Miscellaneous Metal Ores
- 1221 - Bituminous Coal & Lignite Mining
- 1311 - Crude Petroleum & Natural Gas

After entering your peer group, click "Create Peer Group", and then click "Proceed".

**Index Name**

- INTL BUS MACH
- NASDAQ Computer and Data Processing Index [Remove](#)
- 3577 - Computer Peripheral Equipment, NEC (3577) [Remove](#)

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Figure 4.3

c) If multiple selections (of SIC Codes) are to be selected and are not numerically continuous (e.g. SIC Codes 800, 1221, and 200), hold "Ctrl" and make the desired selections to create the P.G. When the desired SIC Codes are selected for the P.G., click on "Create Peer Group" and then on "Proceed" to continue on to Step 4. Please refer to Figure 4.4.

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Customer Login:  Password:  Login

### Create a Total Return Stock Performance Graph

The third step is to create the relevant Peer Groups. A Peer Group is a collection of returns of publicly traded companies or SIC codes that will be used as a comparison to your returns. You can also select an appropriate Industry Index as your Peer Group. To do this, go back to Step 2 "Add Indexes" and add the selected Index to your graph.

**Step 1** [Your Company](#) **Step 2** [Add Indexes](#) **Step 3** [Create Peer Groups](#)

**Peer Group**

Peer Group Name:

Use:  Stock Tickers  SIC Codes

**Peer Group Members:**  
 Select any SIC codes below that you would like to base your index on. Give your peer group a name in the box above and then click "Create Peer Group".

- 100 - Agricultural Production-Crops
- 200 - Agricultural Prod-Livestock & Animal Specialties
- 700 - Agricultural Services
- 800 - Forestry
- 900 - Fishing, Hunting and Trapping
- 1000 - Metal Mining
- 1040 - Gold and Silver Ores
- 1090 - Miscellaneous Metal Ores
- 1221 - Bituminous Coal & Lignite Mining
- 1311 - Crude Petroleum & Natural Gas

After entering your peer group, click "Create Peer Group", and then click "Proceed".

**Comparison of 5 Year Cumulative Total Return (Assumes Initial Investment of \$100)**

Year	Index 1 (Top)	Index 2 (Middle)	Index 3 (Bottom)
2003	103.01	103.01	103.01
2004	180.27	128.77	103.01
2005	180.27	145.52	103.01
2006	180.27	154.52	103.01
2007	206.03	154.52	103.01

**Index Name**

INTL BUS MACH

NASDAQ Computer and Data Processing Index [Remove](#)

3577 - Computer Peripheral Equipment, NEC (3577) [Remove](#)

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Figure 4.4

## Step 4

### Step 4 – BILL ME LATER OPTION

- 1) If the “Bill Me Later” option was chosen at the beginning of the proxy graph creation process (Figure 1), the following login screen would have appeared immediately after choosing the “Bill me Later Option” and clicking on “Proceed” (Please refer to Figure 5).

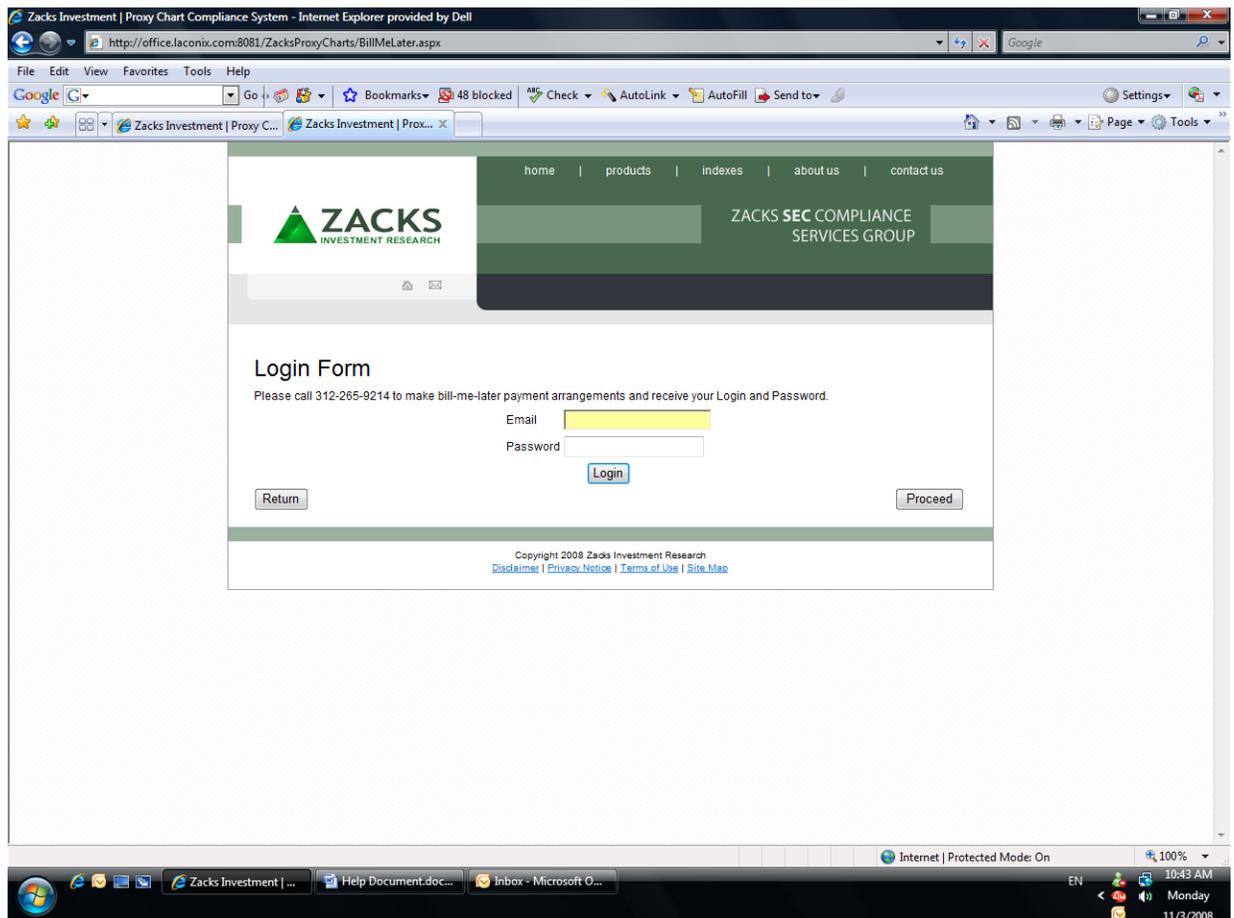


Figure 5

The graph making process under the “Bill Me Later” option is exactly the same as the “Pay By Credit Card.” However, an email address and password are needed before creating a total return stock performance graph when using the “Bill Me Later” option.

### Step 4 – CREDIT CARD PAYMENT OPTION

- 1) To complete the purchase, personal information along with billing address will be required (Please refer to Figure 6). Once entered, please click on “Purchase Now” and then type in the credit card information to complete the transaction on the next screen (Please refer to Figure 6.1).

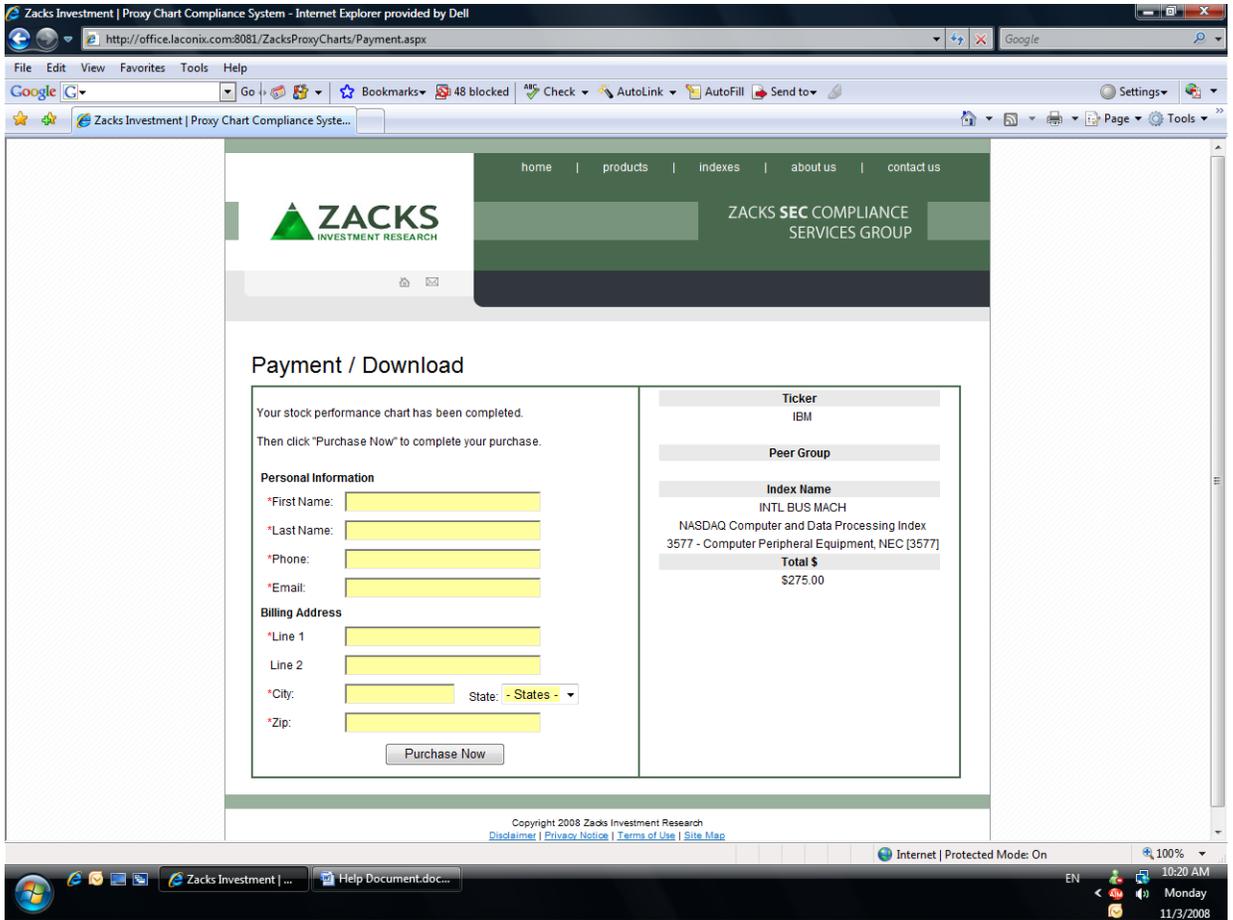


Figure 6

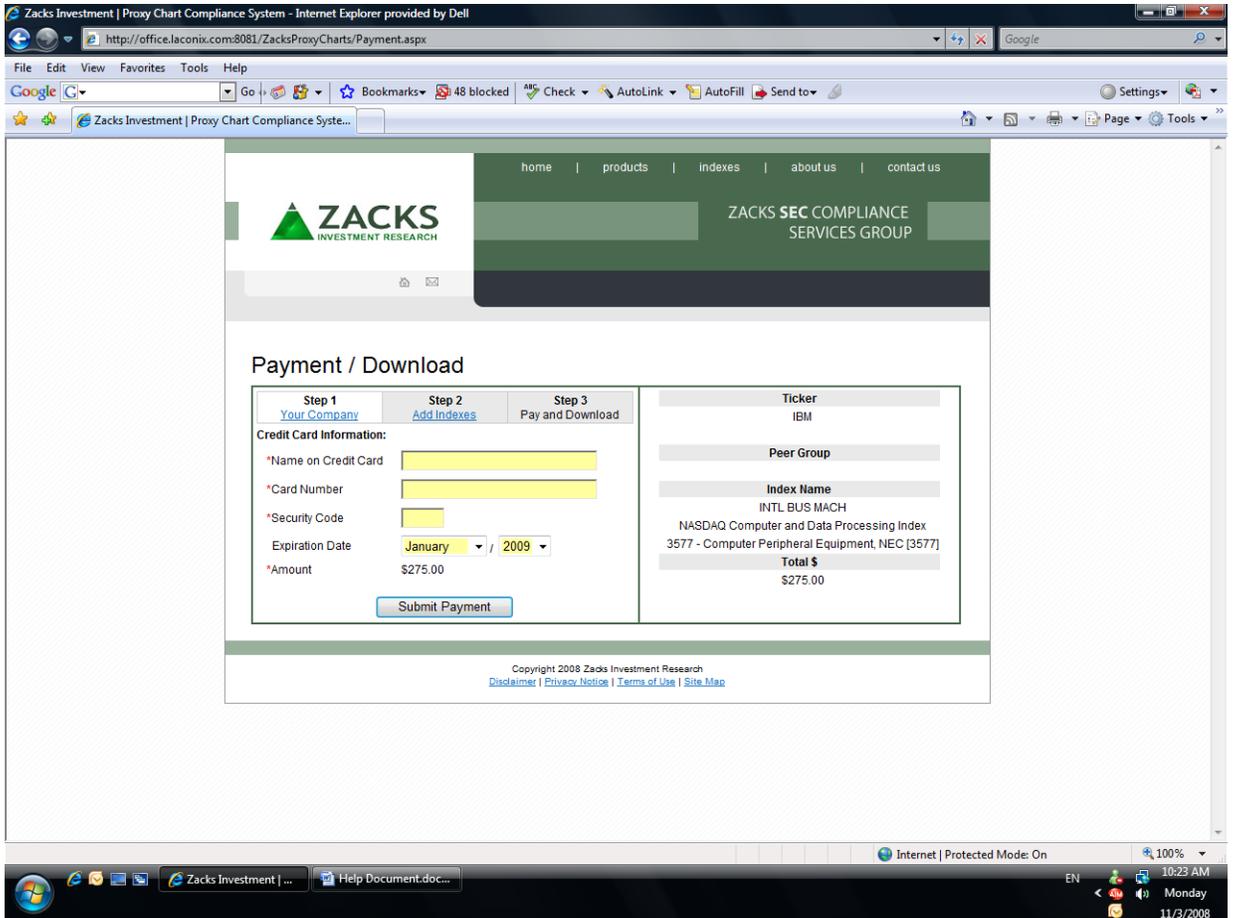


Figure 6.1

After the required credit card information has been typed in, please click on "Submit Payment" to go on to **Step 5**.

## Step 5

- 2) Click on “Download the chart” (located on the lower left side of the screen) and save the graph to the desired location on your PC. Please refer to Figures 6.2 and 6.3.

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### Payment / Download

Done

Step 1	Step 2	Step 3
<a href="#">New Company</a>	Add Indexes	Pay and Download

To download your graph please click on the link at the bottom of this page.

After you download your Total Return Stock Performance Graph please compare it with the graph you filed last year. Even if you did not change your indexes or change the companies in your peer group you may find that some returns in this year's graph may differ slightly from the comparable returns in last year's graph because (a) one of your peer companies included in last year's graph stopped trading this year or (b) Zacks valuation of a non-cash dividend for your company or for a peer company differs from the valuation used by your previous graph provider or (c) if your company had an IPO during the last 5 years, the day used by Zacks as the first day for your chart may differ from the day used as the first day by your last year's graph provider.

If such differences exist please call us at 312-265-9214 or email us at [zspp@zacks.com](mailto:zspp@zacks.com) with any questions you may have.

[Download the chart](#)

<b>Ticker</b>	IBM
<b>Peer Group</b>	
<b>Index Name</b>	INTL BUS MACH
	NASDAQ Computer and Data Processing Index
	3577 - Computer Peripheral Equipment, NEC [3577]
<b>Total \$</b>	\$275.00

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Figure 6.2

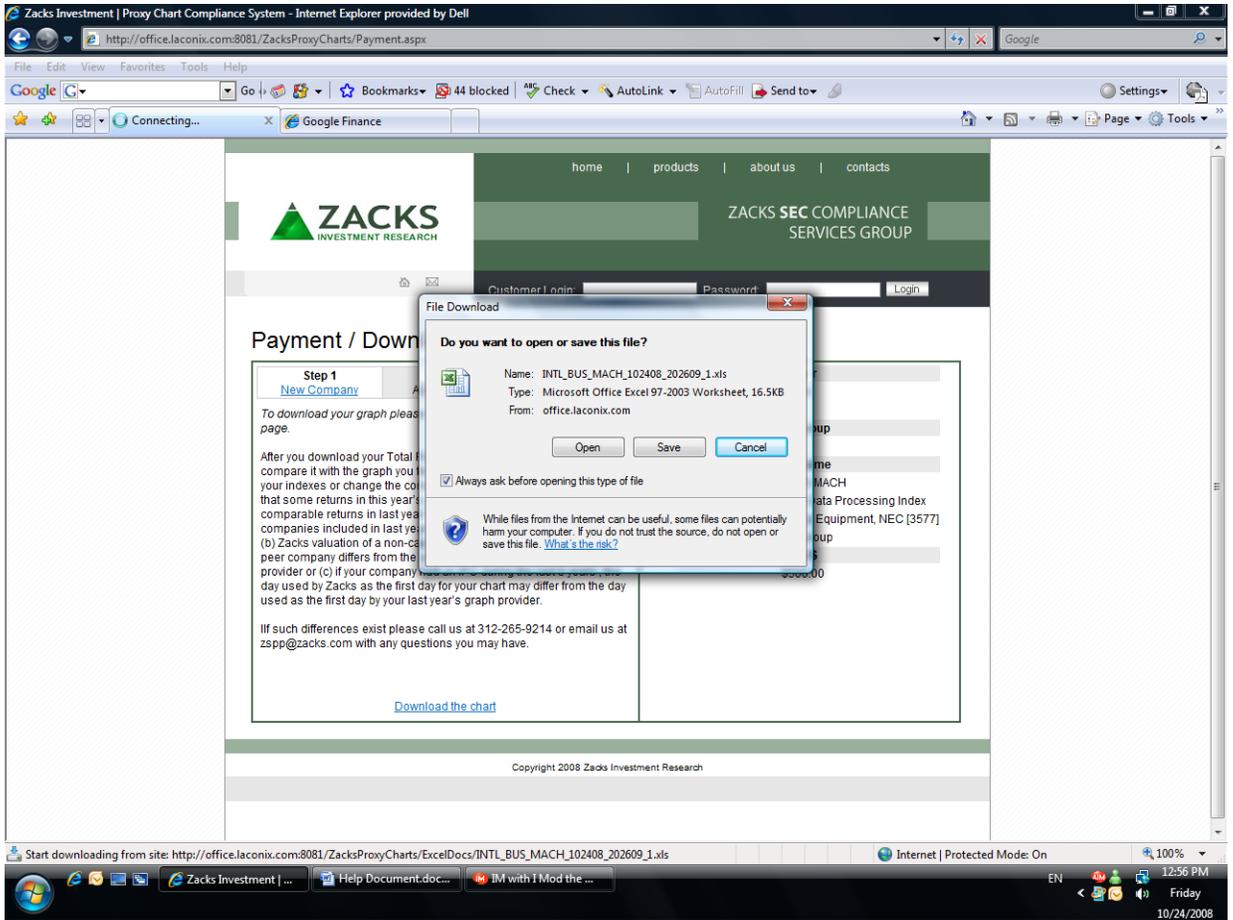


Figure 6.3

If further assistance is needed, please email us at [zspp@zacks.com](mailto:zspp@zacks.com) or call us at 312-265-9214 for customer support (Central Time).