

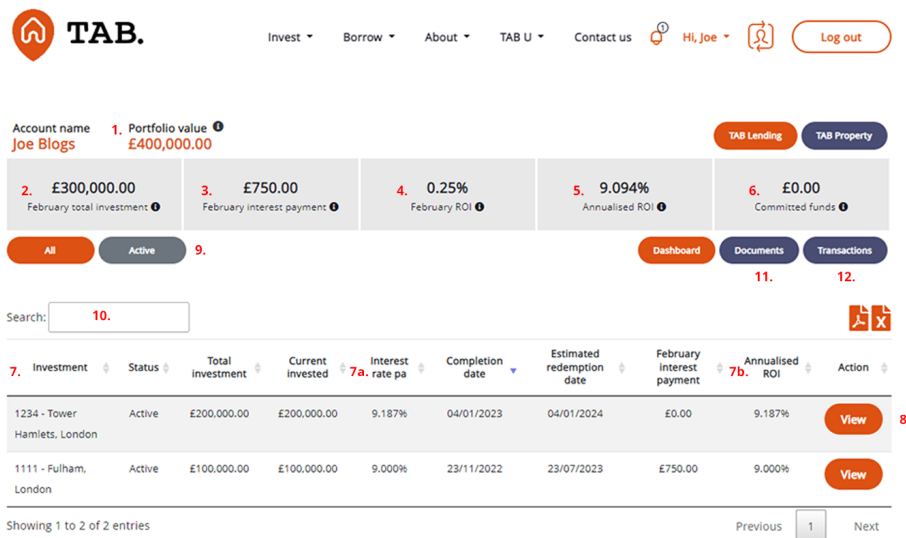
# How to navigate your new dashboard

## How to

30.03.23

We also have made updates to the front end, including our public-facing website and the investor dashboard. After much planning and development, we're excited to announce the launch of our new and improved investor dashboard.

When you log in to your account, you should notice that the dashboard has been designed to be clear and straightforward, so that you can better understand your investments. With helpful tooltips that can be hovered over for descriptions, we hope you find the new dashboard intuitive and user-friendly.



The screenshot shows the TAB investor dashboard for a user named Joe Blogs. The top navigation bar includes links for Invest, Borrow, About, TAB U, Contact us, and a user profile for Hi, Joe with a Log out button. The dashboard displays account information: Account name (Joe Blogs), Portfolio value (£400,000.00), and tabs for TAB Lending and TAB Property. A summary row shows: February total investment (£300,000.00), February interest payment (£750.00), February ROI (0.25%), Annualised ROI (9.094%), and Committed funds (£0.00). Below this are tabs for All, Active, Dashboard, Documents, and Transactions. A search bar is present. The main table lists investments with columns for Investment, Status, Total investment, Current invested, Interest rate pa, Completion date, Estimated redemption date, February interest payment, Annualised ROI, and Action. Two entries are shown: 1234 - Tower Hamlets, London and 1111 - Fulham, London. A pagination bar at the bottom shows 'Showing 1 to 2 of 2 entries' and 'Previous 1 Next'.

7. Investment	Status	Total investment	Current invested	7a. Interest rate pa	Completion date	Estimated redemption date	February interest payment	7b. Annualised ROI	Action
1234 - Tower Hamlets, London	Active	£200,000.00	£200,000.00	9.187%	04/01/2023	04/01/2024	£0.00	9.187%	8. View
1111 - Fulham, London	Active	£100,000.00	£100,000.00	9.000%	23/11/2022	23/07/2023	£750.00	9.000%	View

## What's included in the update?

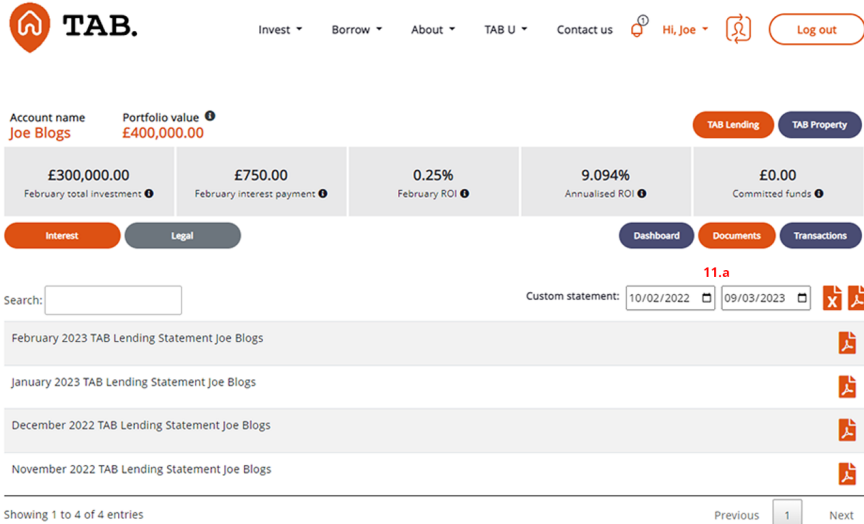
Some of the new features include the display of the following:

1. **Portfolio value:** this is the total value of your active TAB Lending and TAB Property investments, as at today. *This does not include committed funds but will include loans that are now active since your last statement.*
2. **[Month] total investment:** this is the total amount of your TAB Lending investments as at the end of last month. *This figure is also shown on your monthly investment statement.*
3. **[Month] interest payment:** this is the total interest received for your TAB Lending investments last month. *This figure is also shown on your monthly investment statement.*
4. **[Month] ROI:** this is the total interest received for your TAB Lending investments last month. *This allows you to visualise any interest earned from that month's active investments as a percentage.*
5. **Annualised ROI:** is the total interest received to date for your TAB Lending investments. *Investors can view their returns on an annualised basis. The calculation is the annualised weighted average of monthly interest payments.*
6. **Committed funds:** Total TAB Lending investments you have committed with TAB but have not yet completed. *This is where you have told us you have committed to invest in a loan, but TAB has not yet called in funds and the loan is not yet active.*
7. We have also made changes to the way you view your loans. They are now presented in a list format, which can be sorted by any column.

*One thing to note is that the (7a.) 'Interest rate pa' column displays the interest rate of each loan as per the terms agreed. If a loan's interest rate changes mid-way through its term due to Bank of England base rate adjustments, this column is where the figure will be updated. As a result, your (7b.) annualised ROI and interest rate pa may differ.*

8. Click the 'View' button relating to the loan you wish to view to access the TAB Lending investment details page, which contains all the information related to your loan, including email communications with TAB. You can view email communications relating to this loan by clicking the 'Communications' button on the investment details page.

9. We've also added a feature that separates redeemed loans from active investments. To view only your active investments, click on the 'Active' tab. To view redeemed loans, click on the 'Redeemed' tab.
10. In case you need to search for specific information, you can use the search box. This allows you to look for any term, figure, name, or rate.
11. Under the 'Documents' tab, you can access interest statements and legal documents. Your interest statements are available monthly, and if you want to generate a custom statement for a specific date range, you can do so by selecting your preferred dates and clicking either the (11.a) Excel or PDF button next to the dates. If you have commission statements you will also be able to view them within your documents.
12. The 'Transactions' tab displays a comprehensive list of all transactions associated with your account. This includes interest payments, commitments made, redemptions and capital reductions. Similar to a bank account statement, all transaction information can be viewed here.



The screenshot shows the TAB user interface. At the top, there is a navigation bar with the TAB logo, menu items (Invest, Borrow, About, TAB U, Contact us), a user greeting (Hi, Joe), and a Log out button. Below the navigation bar, the user's account information is displayed: Account name 'Joe Blogs' and Portfolio value '£400,000.00'. There are two tabs: 'TAB Lending' (active) and 'TAB Property'. A summary table shows key metrics for February: February total investment (£300,000.00), February interest payment (£750.00), February ROI (0.25%), Annualised ROI (9.094%), and Committed funds (£0.00). Below the summary table, there are tabs for 'Interest' and 'Legal'. A 'Custom statement' section allows users to generate statements for a specific date range (10/02/2022 to 09/03/2023) with options for Excel and PDF. A list of documents is shown, including 'February 2023 TAB Lending Statement Joe Blogs', 'January 2023 TAB Lending Statement Joe Blogs', 'December 2022 TAB Lending Statement Joe Blogs', and 'November 2022 TAB Lending Statement Joe Blogs'. At the bottom, there is a pagination control showing 'Showing 1 to 4 of 4 entries' and 'Previous 1 Next'.

We have also prepared [FAQs](#) and updated our [glossary of terms](#).

We hope that the how to video and this blog provides you with a bit of clarity on the changes and that your new account is presented in a clearer, easier to understand way. If you have any questions or feedback relating to the investor dashboard then please direct them to Karen Delaney: [help@tabhq.com](mailto:help@tabhq.com).

**Capital is at risk.** Property values can go down as well as up. Borrowers may default and investments may not perform as expected. Interest and income are not guaranteed. Returns may vary. You should not invest more than you can afford to lose. TAB is not authorised by the Financial Conduct Authority. Investments are not regulated and you will have no access to the Financial Services Compensation Scheme (FSCS) or the Financial Ombudsman Service (FOS). Past performance and forecasts are not reliable indicators of future results and should not be relied on. Forecasts are based on TAB's own internal calculations and opinions and may change. Investments are illiquid. Once invested, you are committed for the full term. Tax treatment depends on individual circumstances and may change.

You are advised to obtain appropriate tax or investment advice where necessary. Understand more about the key risks [here](#).

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