

MZiQ RELEASE

# Innovation and New Technologies

April 2025



Empowering your investor relations strategy

MZ

# IR Dashboard & Insights

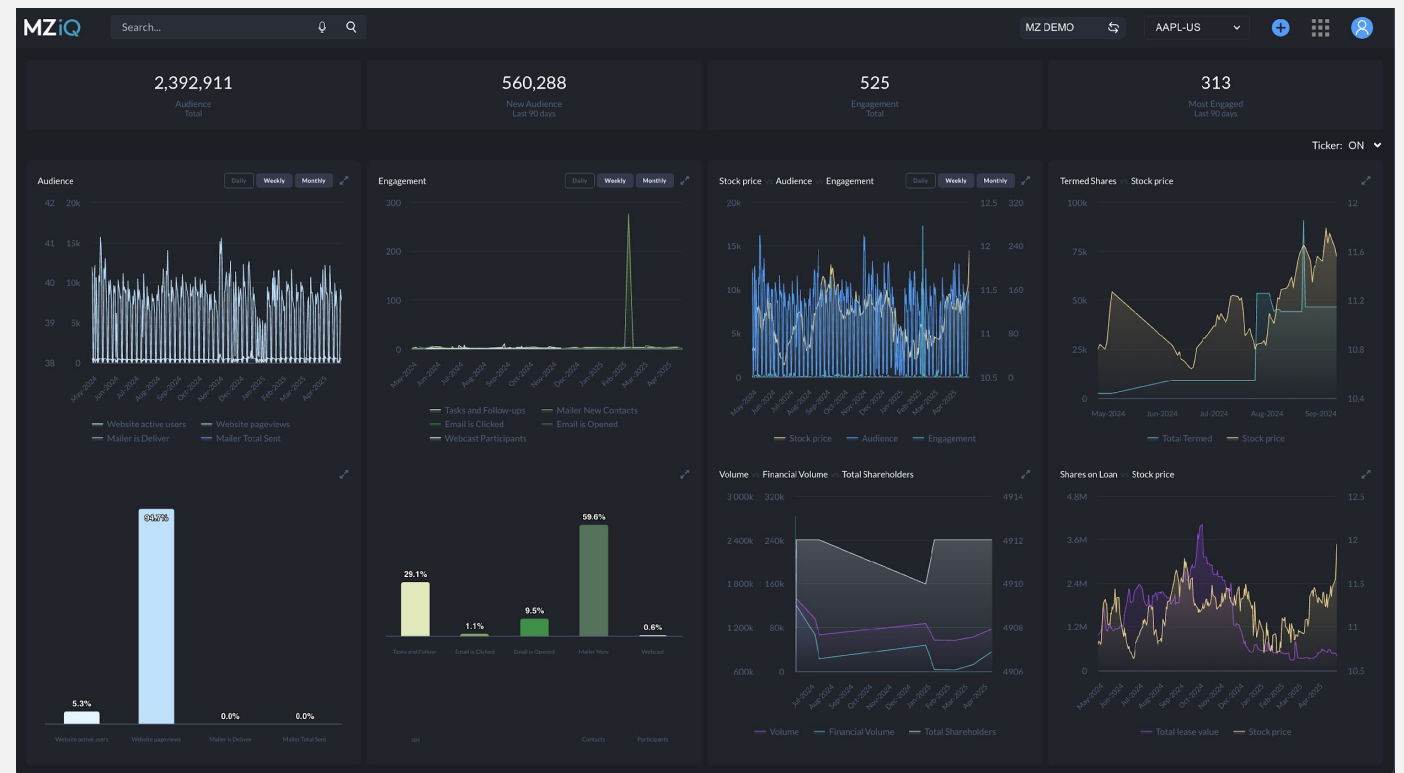
Dashboard with audience, engagement, and securities lending & forward transaction indicators

## Dashboard

New dashboard with indicator tracking to support monitoring the reach and impact of the IR program:

- Audience: Website, Mailer, Webcast
- Engagement: IRM, Shareholders, and insights
- Securities lending, forward transactions, and performance

Additional indicators and customization capabilities will be available soon.

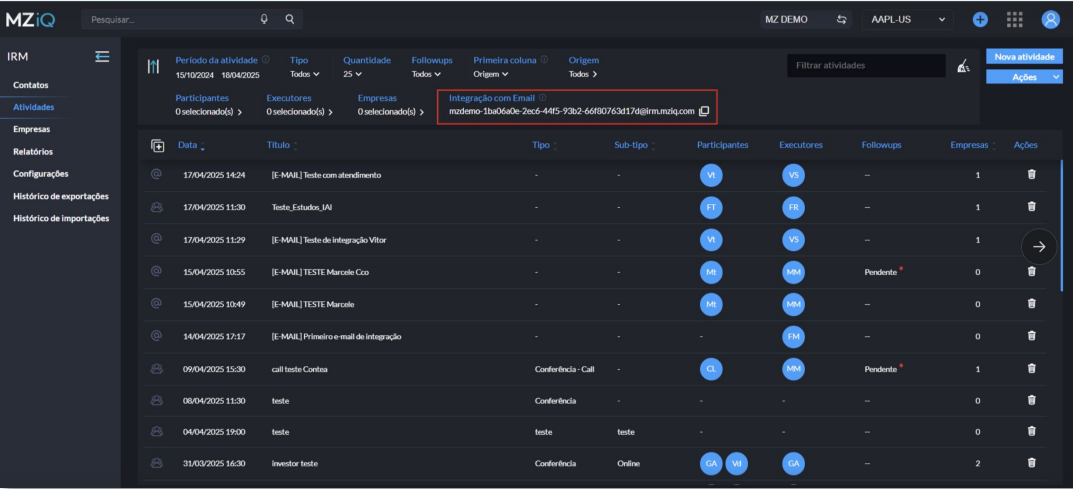
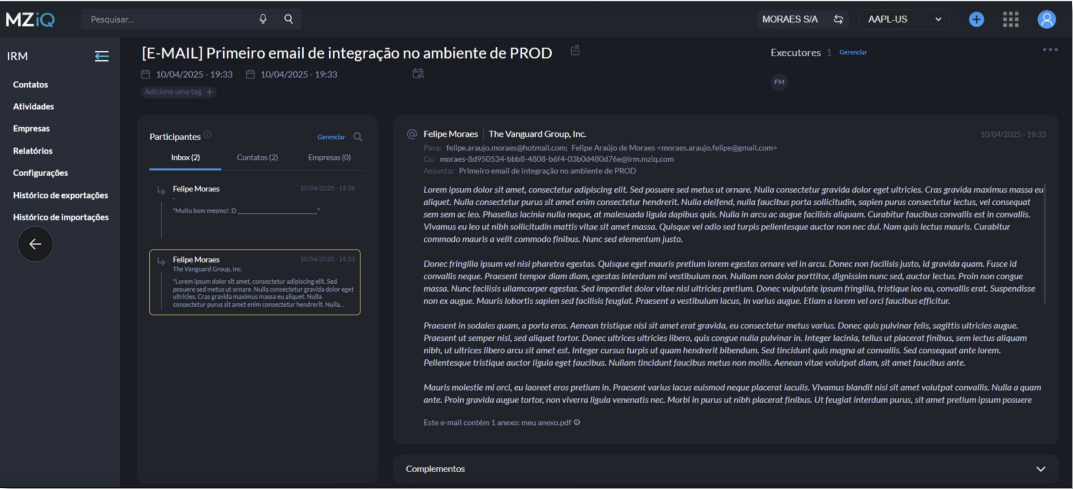


# Automatic email synchronization within the IRM

Automatic email sending integration directly within the IRM

## IRM

Now, with the new email integration feature directly within the CRM, you can automate the logging of investor communications, save time, and ensure a complete history. More organization. More compliance. More efficiency for the IR department. All in a single platform, MZiQ.



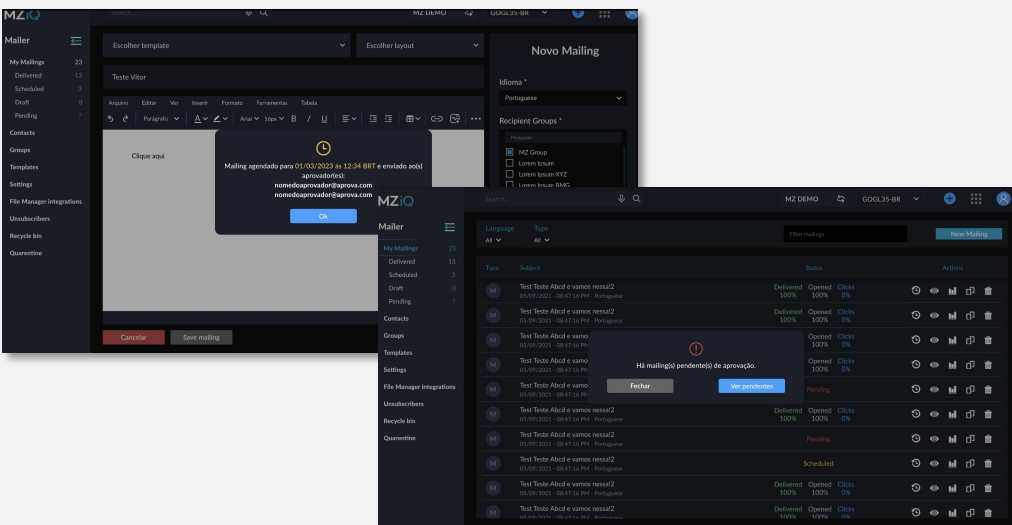
# Data governance and enhanced security

SSO (Single Sign-On) for one-click login, plus workflows for greater control over information disclosure

## Mailer and File Manager

Approval workflow for the mailer and file manager tools.

This way, mailing blasts become safer and more predictable.



## SSO (Single Sign-On)

This implementation brings significant improvements to the authentication of MZ products, making the process more secure, practical, and efficient.

It also simplifies access with integration to Google, Microsoft, and others.



# Smart Profiles

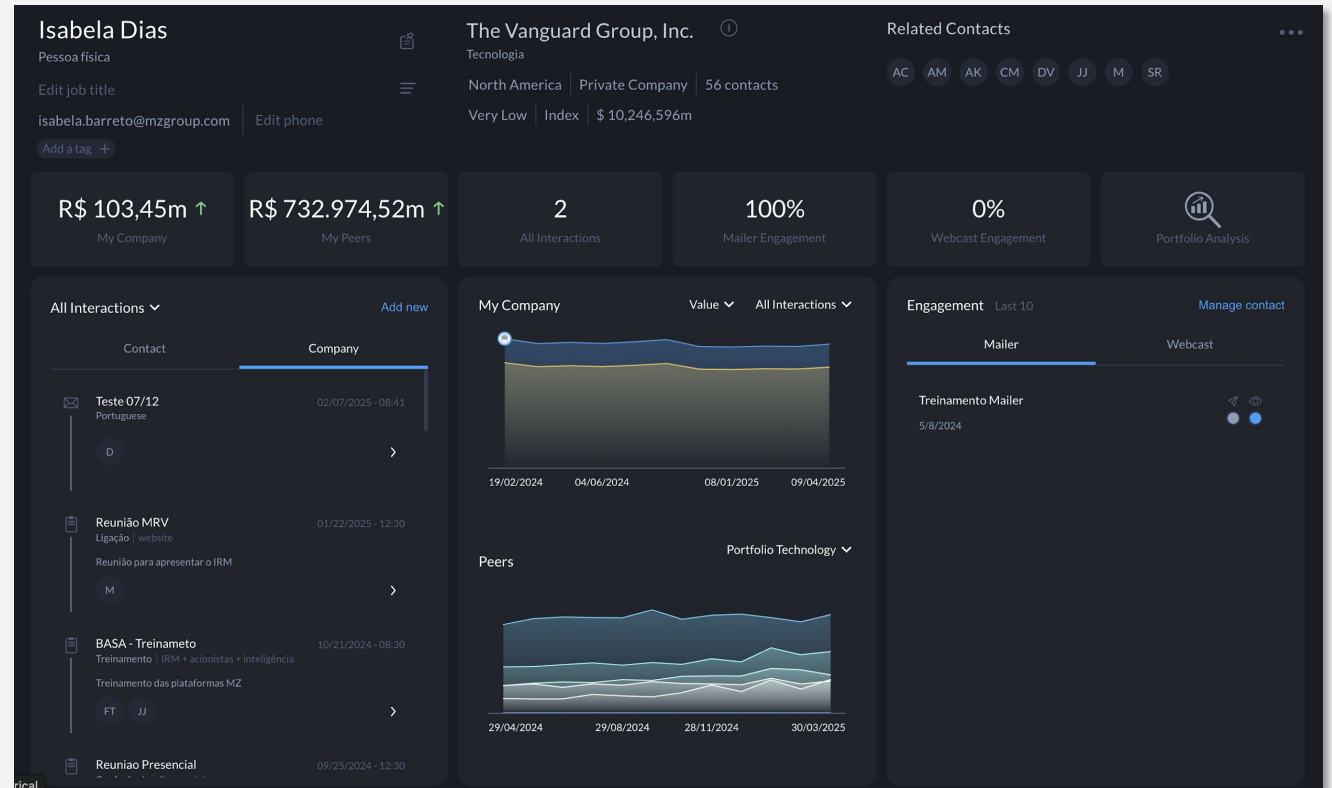
Integrating contact management and automated insights into a single screen

## IRM

Now, you can manage all the interactions and relevant information about a contact on a single page.

- Shareholding position in the company
- Participation in listed peer companies
- Engagement level (Mailer & Webcast)
- History of activities and interactions
- Position in value & number of shares

This centralization simplifies monitoring and enhances efficiency in investor relations management.





# Smart PDF Profiles

Generate the meeting factsheet with a single click

## IRM

The PDF profile features a new design that integrates more information about the institution and contact details to support your investor meeting preparation

- Profile and Address
- Background and Investment Strategy
- Company positioning and breakdown of the largest funds
- Position and evolution among peers
- Analysis by sector, region, and major movements
- Interactions with position changes vs. share price.

The new profile factsheet integrates more data and market intelligence.



## Support for shareholder base management

## Automation in grouping and personalized classification

## Shareholders

Besides grouping by Manager, MZiQ now offers the flexibility to classify shareholders according to the company's specific needs.

This means that the user can organize the shareholders in the way that best meets the company's objectives and strategies, providing a more precise and personalized view.

MZIQ

Search...

🔍

MZ.DEMO

🔑

AAPL-US

+

⌵

⌵

Shareholders

☰

Summary

Key statistics

Ownership

Reports

Shareholders

Charts

Monitoring ▾

Historicals ▾

Stock type

ON ▾

View

Grouped ▾

Quantity

25 ▾

Date

04/10/2025

Grouping

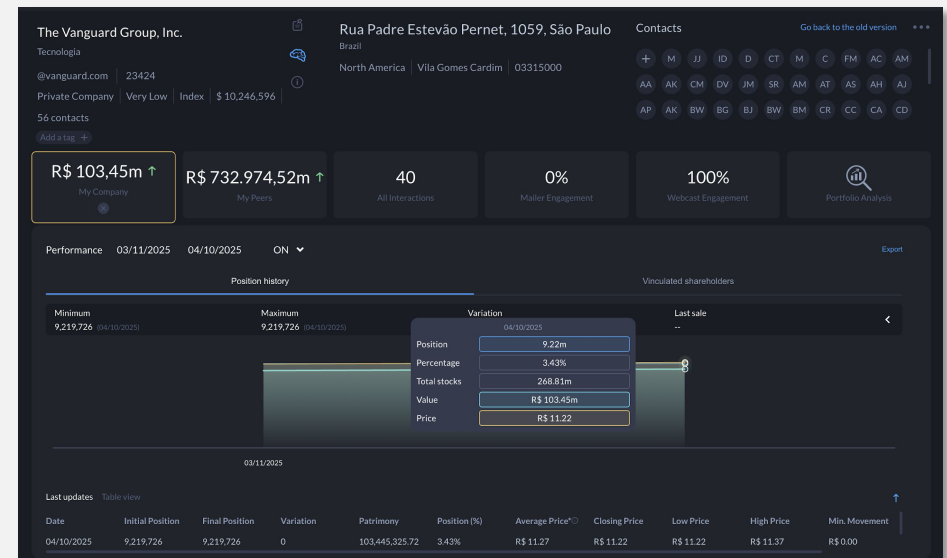
All ▾

Search...

Add

Export

Name	Shareholder type	Country	Final volume ▾	Value
⊞ Swiss Re	Group	--	58,798,980 (21.87%)	R\$ 659,724,555.60
⊞ Pessoa Física	Group	--	18,293,191 (6.81%)	R\$ 205,249,603.02
⊞ BlackRock (Singapore) Ltd.	Group	--	9,636,020 (3.58%)	R\$ 108,116,144.40
⊞ The Vanguard Group, Inc.	Group	--	9,219,726 (3.43%)	R\$ 103,445,325.72
⊞ BlackRock, Inc.	Group	--	7,741,007 (2.88%)	R\$ 86,854,098.54
⊞ ORBIS NOVA	Group	--	7,352,280 (2.74%)	R\$ 82,492,581.60
⊞ Fisher Asset	Group	--	6,534,149 (2.43%)	R\$ 73,313,151.78
⊞ FIDELITY	Group	--	6,109,965 (2.27%)	R\$ 68,553,807.30
⊞ Goldman	Group	--	5,746,257 (2.14%)	R\$ 64,473,003.54
⊞ teste123	Group	--	4,424,022 (1.65%)	R\$ 49,637,526.84
⊞ Northern Trust Investments	Group	--	4,297,127 (1.60%)	R\$ 48,213,764.94
⊞ ABCDE	Group	--	3,883,179 (1.44%)	R\$ 43,569,268.38
⊞ COLUMBIA ASSET MANAGEMENT	Group	--	3,507,000 (1.30%)	R\$ 39,348,540.00
⊞ DAVIS NEW YORK VENTURE FUND INC DAVIS GLOBAL FUND	Fund	US	3,240,602 (1.21%)	R\$ 36,359,554.44
⊞ GOLDMAN SACHS BANK NY	Group	--	2,908,654 (1.09%)	R\$ 32,757,602.12



# Automatic notifications

Automated reports sent directly to your email

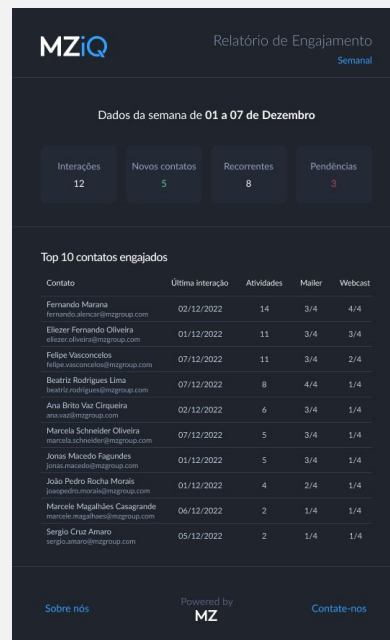
## Mailer

Engagement Analytics & New Registrations



## IRM

Interactions and Engagement with the Market



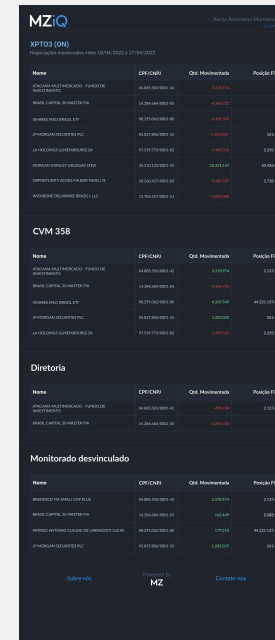
## Webcast

List of participants with recurrence



## Shareholders

Monitor the buying and selling of funds and investors



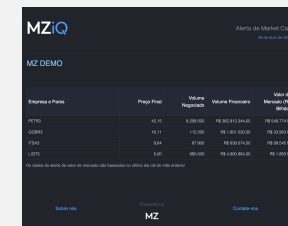
## Shareholders

Reduction and Increase of Relevant Stake Alert



## Market

Monitor the MarketCap of your peers





# Automated shareholder base report

Have full control of your shareholder base

## Mailer

Automatic and daily report with analysis of the shareholder base grouped by manager:

- Quantity and volume
- Largest Positions
- Largest Buyers
- Largest Sellers
- New Shareholders
- Shareholders who zeroed positions
- Latest CRM interactions

MZiQ

Resumo de Base Acionária

24/02/2022

XPT03 (ON)

Variações relativas às posições do dia 24/02/2022

Quantidade de ações	Quantidade de Acionistas	Entradas e Saídas
105.841.152	(Fundos e Pessoas Físicas)	Fundos
Volume apurado	Total: 9.332	244 (+188, -1.358)
186,9M		Pessoa Física
		9.088 (+8.370, -94.541)

Top Holders

Nome	Grupo	País	Qtd. Comprada
SAS SHIPPING AGENCIES SERVICES SARL SAS SHIPPING AGENCIES SERVICES SARL * *	MORGAN STANLEY	BR	19.378.974
ALASKA POLAND FIA BOR NIVEL 1 *	MORGAN STANLEY	BR	19.328.974
TARPON GT MASTER FUNDO DE INVESTIMENTO FM ACOES	MORGAN STANLEY	US	12.578.974
SERVICES SARL SAS SHIPPING AGENCIES SERVICES SARL * *	MORGAN STANLEY	US	9.600.000
SHIPPING AGENCIES SERVICES SARL * *	MORGAN STANLEY	BR	9.099.400
* NOVO ACONISTA			

Top Compradores

Nome	País	Variação	Var. %	Qtd. Ações	Grupo	Qtd. Ações Grupo
VANGUARD TOTAL INTERNATIONAL STOCK INDEX F.D. A SE VANS F	BR	2.555.219.378.974	355,17%	555.219.378.974	VANGUARD TOTAL INTERNATIONAL STOCK INDEX F.D. A SE VANS F	19.378.974
Fundo 02	BR	19.328.974	355,17%	19.328.974	MORGAN STANLEY	19.328.974
Fundo 03	US	12.578.974	100,00%	12.578.974	BLACKROCK	12.578.974
Fundo 04	US	9.600.000	100,00%	9.600.000	RUANE, CUNNING AND GOLDFARB	9.600.000
Fundo 05	BR	9.099.400	100,00%	9.099.400	BRASIL CAPITAL	9.099.400

Top Vendedores

Nome	País	Variação	Var. %	Qtd. Ações	Grupo	Qtd. Ações Grupo
VANGUARD TOTAL INTERNATIONAL STOCK INDEX F.D. A SE VANS F	BR	2.555.219.378.974	355,17%	555.219.378.974	VANGUARD TOTAL INTERNATIONAL STOCK INDEX F.D. A SE VANS F	555.219.378.974
Fundo 02	BR	19.328.974	355,17%	19.328.974	MORGAN STANLEY	19.328.974
Fundo 03	US	12.578.974	100,00%	12.578.974	BLACKROCK	12.578.974
Fundo 04	US	9.600.000	100,00%	9.600.000	RUANE, CUNIFF AND GOLDFARB	9.600.000
Fundo 05	BR	9.099.400	100,00%	9.099.400	BRASIL CAPITAL	9.099.400

Posições Zeradas

Nome	País	Grupo	Qtd. Venda
FUNDO 06	BR	XPTO INVESTIMENTOS	19.378.974
VANGUARD TOTAL INTERNATIONAL STOCK INDEX F.D. A SE VANS VANS VAN	BR	MORGAN STANLEY	19.328.974
BETHOVEN	US	BLACKROCK	12.578.974
FUNDO 07	US	RUANE, CUNIFF AND GOLDFARB	9.600.000
FUNDO 09	BR	BRASIL CAPITAL	9.099.400

Atividades com acionistas

Grupo	Datas de Atividade	Variação desde a atividade	Qtd. Ações Grupo
FUNDO 06	24/04/2022	0	19.378.974
VANGUARD TOTAL INTERNATIONAL STOCK INDEX F.D. A SE VANS VANS VAN	21/04/2022	19.328.974	19.328.974
BETHOVEN	22/04/2022	12.578.974	12.578.974
FUNDO 07	22/04/2022	0	9.600.000
FUNDO 09	23/04/2022	0	9.099.400

Sobre nós

Powered by MZ

Contate-nos

# Outlook Add-in

Access fund profile and MRI data directly from your Outlook

New Mail

Delete

Archive

Move

Flag

Mark Unread

Sync

HubSpot Sales

MZ Outlook Add-in

ph@mzgroup.com

Inbox

Drafts

Archive

Sent

Deleted Items

Junk Email

[Email] Liveira

Arquivo MZ

Arquivo PH

Arquivo Sales

Clutter

Conversation History

Inbox1

ph@mzgroup.com...

Untitled Folder

Saved Searches

On My Computer

Arquivo Sales

Older

MZ | Apoio para fundos e gestoras 25/10/23  
Luis, tudo bem? Obrigada pelo retorno via Link...

PH Zabisky  
MZ & Guide - Soluções de comunic... 24/09/23  
Rodrigo, Obrigado pelo retorno via LinkedIn. A...

PH Zabisky  
MZ & Exes - Soluções de comunica... 25/09/23  
Segue email que mando para a gestoras. Juliana...

PH Zabisky  
MZ & Arlanee - Soluções de Comu... 09/08/23  
Paulo, boa tarde. Tudo bem? Quem me passou s...

PH Zabisky  
Apoio na estratégia de relações com... 18/07/23  
Time AZ Quest, Parabéns pelo crescimento e pr...

Alexandre Trocoli  
Sua gestora está pronta para os im... 20/03/23  
PH, boa tarde. Tudo bem? A Resolução CVM 17...

PH Zabisky  
Apoio na estratégia de relações co... 15/03/23  
Pedro, Obrigado pelo retorno via LinkedIn. Segu...

PH Zabisky  
Dica de RI #1: Como realizar um pla... 13/02/23  
Leandro, bom dia. Com o propósito de compart...

PH Zabisky  
Luciana, welcome to MZ Team 03/02/23  
Oi Luciana, Seja bem vinda a MZ! Ficamos muito...

PH Zabisky  
Apoio na estratégia de relações co... 02/02/23  
Danyel, Obrigado pelo retorno via LinkedIn. A M...

PH Zabisky  
Wedix, apoio na estratégia de relaç... 24/01/23  
Giuliano, boa tarde. Parabéns pelo crescimento...

PH Zabisky  
Edio, apoio na estratégia de relaç... 12/01/23  
Edio, de acordo com o novo modelo de cobrança a S&P

Sua gestora está pronta para os impactos do novo marco regulatório dos Fundos de Investimento?

AT Alexandre Trocoli <alexandre.trocoli... Monday, 20 March 2023 at 11:47  
Te: ph@mzgroup.com

PH, boa tarde.

Tudo bem?

A Resolução CVM 175 que dispõe sobre a constituição, funcionamento e divulgação de informações dos fundos de investimento, entrará em vigor a partir do dia 03 de abril de 2023, e nela existem mudanças relevantes com relação a disponibilização de informações periódicas que terão que ser divulgadas na página do fundo, no site do administrador e/ou do gestor.

Visando apoiar as gestoras, a MZ desenvolveu uma tecnologia que automatiza a atualização dos websites de forma integrada a CVM (Fundos.Net), garantindo compliance junto aos órgãos reguladores, e também mantém a tabela de cotas & rentabilidades dos fundos atualizada automaticamente.

Ficamos pessoalmente a sua disposição para agendar um call para conversarmos, basta responder este e-mail e entraremos em contato com algumas opções de datas. Conte com a MZ!

Segue [Link](#) para acessar a Resolução 175

Resolução CVM 175:

Confira as mudanças para os fundos de investimentos

MZ Outlo... My Day


Alexandre Trocoli  
Diretor Comercial

The Vanguard Group, Inc.  
North America · Very Low · Index · \$7,909,760m

RS90.302m  
Company

90  
Interactions

1  
Attendances



Peers (\$)

Aug 23	Dec 23	Apr 24	Aug 24
AMZN-US			745.949m
MSFT-US			635.781m
GOOGL-US			472.048m
TSLA-US			221.453m
FB-US			177.543m
My Company			8.006m

MZ Outlo... My Day

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North America · Very Low · Index · \$7,909,760m

RS90.302m  
Company

90  
Interactions

1  
Attendances

Interactions [Add new](#)

[INT] Aceito: Call - Sales Team - qua... Aug 27, 2024  
Call - Sales Team Alexandre Trócoli aceitou este convite. Entrar com o Google Meet Link da reuni

Re: [EXT] RE: Contato Alexandre Tró... Aug 22, 2024  
Olá Silvio, boa tarde. OK sem problemas, hoje entã... não está cancelado o call. Podemos reagendar o...

[INT] Aceito: Call - Sales Team - qui... Aug 21, 2024  
Call - Sales Team Alexandre Trócoli aceitou este convite. Entrar com o Google Meet Link da reuni

Re: [EXT] Rescisão de Contrato MZ -... Aug 21, 2024  
Caras, o Trocoli falou com o cliente, o João disse que tinha acionado a MZ no mês em Junho para...

Re: [EXT] Catch-up Alex Alencar Aug 20, 2024  
Que ótimo Alex, Ipanema fica perto de você? Cas... o sim, podemos ir na Confeitaria Colombo que t...

Re: [EXT] Catch-up Alex Alencar Aug 20, 2024  
Olá Alex, Boa tarde. Será um prazer encontrá-lo no Rio, eu tenho agenda disponível no dia 29 de...

[INT] cafe com Alex Alencar no Rio Aug 20, 2024  
Bom dia PH e Alexandre, Na 4a estarei o dia inteir... ro na rua e para um call acho que nao seria bom...

MZ Outlo... My Day

Alexandre Trocoli  
Diretor Comercial

The Vanguard Group, Inc.  
North America · Very Low · Index · \$7,909,760m

RS90.302m  
Company

90  
Interactions

1  
Attendances

Webcast Participation [Last 10](#) [See More](#)

Participation

Earnings conference 3Q23 10 Nov 2023

# MZ is a leader in investor relations solutions

Innovative technologies and exceptional customer service

