



CxReports

Visual Guide

Welcome

Embark on a visual journey through CxReports!

This document showcases the capabilities and diverse set of components of our reporting toolkit, demonstrating how data can be transformed into engaging visuals. Suitable for both new and experienced users, it aims to inspire creativity and assist in the development of your own reports.

Please note that this is not the official documentation. For detailed guidelines and instructions, please visit docs.cx-reports.com.

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Components

Textual Elements

Text in reports plays a critical role in conveying detailed information, explaining data insights, and providing context for visual elements like charts and tables. Effective use of text ensures that a report communicates its findings clearly and persuasively.

Headings

Headings serve as navigational and organizational tools in documents, guiding readers through the content by breaking it down into manageable sections and sub-sections. When these headings are formatted correctly, they can be automatically incorporated into a table of contents (TOC), providing a detailed overview of the document's structure at a glance.

Documents can feature up to six levels of headings, whose appearance can be customized under **Themes** > **Typography** settings to establish a coherent visual hierarchy.

Heading 1

Heading 2

Heading 3

Heading 4

Heading 5

Heading 6

Text

Most of the text in reports is simple text without any formatting, focusing on clarity and straightforward communication of information.

Rich Text

Sometimes, important elements within a report need to be highlighted using formatting options such as **bold**, *italic*, or underline; rich text can also support features like lists, nested lists, and [hyperlinks](#) to organize information more effectively and provide access to additional resources.

1. Item 1
2. Item 2
3. Item 3
 - Sub Item 1
 - Sub Item 2

Tables of Contents

A table of contents provides a structured overview of a document's sections and their respective page numbers, facilitating easy navigation for readers.

Each item in a table of contents is clickable, leading directly to the specific section it represents for easy navigation.

Components	2
Textual Elements	3
Data Tables	6
Charts	10
Visual Elements	16
Features	18
Layout	19
Data and Text	20
Pagination	22

When space is limited, the table of contents can be effectively split into multiple columns to maximize the use of available page area.

Components	2	Features	18
Textual Elements	3	Layout	19
Data Tables	6	Data and Text	20
Charts	10	Pagination	22
Visual Elements	16		

In some cases, top-level entries in the table of contents represent special pages like parts or chapter covers, which may not require associated page numbers and can feature specialized styling.

These entries often serve as section dividers or major breakpoints in the document and are highlighted with distinct fonts, sizes, or colors to denote their significance.

Components		Features	
Textual Elements	3	Layout	19
Data Tables	6	Data and Text	20
Charts	10	Pagination	22
Visual Elements	16		

Lists

The List component allows the creation of advanced, structured lists where each item can be more complex than just simple text. This component offers additional controls that enhance the customization and functionality of lists, including options to adjust the indentation level, change bullet shapes, and select bullet colors.

- Item 1
 - Item 2
 - Item 3
 -
- a. Item 1
 - b. Item 2
 - c. Item 3
 - d.
- i. Item 1
 - ii. Item 2
 - iii. Item 3
 - iv.

Key Value Tables

Key-value tables are instrumental in displaying multiple related data fields by organizing them into a simple and intuitive format, where each key (or field name) is directly associated with its corresponding value. This structure is particularly useful for summarizing detailed information where each piece of data is important and needs to be easily accessible.

Product Name:	Widget X1000
Dimensions:	10×4×1 inches
Weight:	2 lbs
Material:	High-grade aluminum
Color Options:	Silver, Black, Red
Battery Life:	18 hours
Water Resistance:	Up to 30 meters

Data Tables

Tables in reports are essential for summarizing data clearly and concisely. They're used to compare figures, illustrate trends, and present relationships between data sets. In finance, tables display financial statements and forecasts. Scientific reports use them to summarize experimental results and statistical data.

Education and marketing reports leverage tables to show performance metrics, demographics, and sales figures, respectively. The structured format of tables allows for quick interpretation and insight, making them a key tool in data communication.

Name	Position	Department
John Doe	Software Engineer	Development
Jane Smith	Project Manager	Management
Emily Johnson	UI/UX Designer	Design

Formatting

Data within tables can be formatted in various ways to enhance readability and context, such as numbers, percentages, currencies, and dates, catering to the specific nature and requirements of the information presented.

Employee Name	Hire Date	Hours Worked	Hourly Rate	Bonus Percentage	Total Earnings
John Doe	May 2021	160.00	\$25.50	10%	\$4,060.00
Jane Smith	Mar 2019	175.00	\$30.75	15%	\$5,681.25
Emily Johnson	Sep 2020	150.00	\$28.00	8%	\$4,200.00

Data Aggregation

Data aggregation in tables involves grouping data by specific attributes, calculating sums and averages for these groups, and providing clear captions and footers. This approach organizes complex datasets into understandable segments, allowing for quick analysis of trends, totals, and averages.

By summarizing data in this structured manner, it simplifies interpretation and supports informed decision-making by highlighting key metrics and patterns within the data.

A table footer can be utilized to display the total sums of numerical columns, providing a concise summary of key data at a glance.

Client	Product	Quantity	Price Per Item	Order Total
Acme Corp	Laptop	2	\$1,200.00	\$2,400.00
Acme Corp	Smartphone	5	\$600.00	\$3,000.00
Globex Inc	Laptop	1	\$1,200.00	\$1,200.00
Globex Inc	Tablet	3	\$500.00	\$1,500.00
Initech	Smartphone	2	\$600.00	\$1,200.00
Initech	Tablet	1	\$500.00	\$500.00
3 clients	3 products	14	\$700.00	\$9,800.00

Grouping

Data in tables can be broken into multiple groups, enhancing readability by segmenting information into more manageable and coherent sections.

Category	Units Sold	Avg Unit Price	Revenue
Books			
Science Fiction	500	\$20.00	\$10,000.00
Romance	300	\$30.00	\$9,000.00
2 categories	800	\$23.75	\$19,000.00
Electronics			
Laptops	120	\$950.00	\$114,000.00
Smartphones	300	\$700.00	\$210,000.00
Tablets	200	\$450.00	\$90,000.00
3 categories	620	\$667.74	\$414,000.00
Home Appliances			
Refrigerators	80	\$1,200.00	\$96,000.00
Washing Machines	90	\$800.00	\$72,000.00
2 categories	170	\$988.24	\$168,000.00
TOTAL	1,590	\$377.99	\$601,000.00

Caption Summaries

Showing aggregate values in group captions can significantly enhance readability.

Category	Units Sold	Avg Unit Price	Revenue
Books	800	\$23.75	\$19,000.00
Science Fiction	500	\$20.00	\$10,000.00
Romance	300	\$30.00	\$9,000.00
Electronics	620	\$667.74	\$414,000.00
Laptops	120	\$950.00	\$114,000.00
Smartphones	300	\$700.00	\$210,000.00
Tablets	200	\$450.00	\$90,000.00
Home Appliances	170	\$988.24	\$168,000.00
Refrigerators	80	\$1,200.00	\$96,000.00
Washing Machines	90	\$800.00	\$72,000.00
TOTAL	1,590	\$377.99	\$601,000.00

Multiline Headers

Complex table headers, where some headers span multiple related fields, organize data into hierarchical categories, providing a clearer overview and facilitating easier comparison of interrelated information.

Name	Contact		Address	
	Phone	Email	City	Country
Julia Keeling	171-164-8802	julia.keeling@example.com	Lake Eltaport	Singapore
Erich Murray	859-748-7834	erich.murray@example.com	New Darren	Micronesia
Harmony Koch	816-760-7428	harmony.koch@example.com	Quitzone	Cote d'Ivoire
Oswaldo Harris	577-349-7771	oswald.harris@example.com	Port Conner	Sierra Leone
Eric Wolf	691-271-1193	eric.wolf@example.com	Lake Mason	Cuba

Multiline Rows

In tables with numerous columns, data is often presented in a two-line row format to accommodate all the information without compromising clarity and legibility.

Open Date	Action	Quantity	Symbol	Open Note	Open Price	Net Result
Close Date	Asset			Close Note	Close Price	%
04/01/2024	Buy	10	AAPL	Positive earnings report	\$100.00	+\$35.00
04/01/2024	Apple Inc.			Reached target price	\$105.00	+3.33%
04/02/2024	Sell	5	TSLA	Anticipating product launch	\$200.00	-\$61.00
04/02/2024	Tesla, Inc.			Sold after market dip	\$190.00	-6.37%
04/03/2024	Buy	15	AMZN	Market expansion news	\$150.00	+\$57.00
04/03/2024	Amazon.com, Inc.			Profit-taking	\$155.00	+6.13%
04/04/2024	Sell	8	GOOGL	Investing in AI technology	\$300.00	+\$58.00
04/04/2024	Alphabet Inc.			Trimming position due to portfolio rebalancing	\$310.00	+7.70%

Whole lines can be used to present extensive descriptions that cannot be confined to a single cell.

Name	Status	Completion	Leader	Start Date
Description				
Project Alpha	Active	75%	Alice Johnson	2023-01-15
Project Alpha is currently in the development phase, with most of the core components implemented and undergoing testing. This project aims to enhance our main product line.				
Project Beta	Planning	20%	Bob Smith	2024-03-01
Project Beta is in the early stages of planning, with project scopes being defined and initial designs being drafted. The project focuses on exploring new market opportunities.				
Project Gamma	Completed	100%	Cynthia Ramos	2022-05-20
Project Gamma has been completed successfully, achieving all its objectives and is now in the maintenance phase. It resulted in significant improvements in operational efficiency.				

Merged Cells

To maintain a clean and coherent presentation in tables, adjacent cells with identical values are sometimes merged, creating a unified and seamless display of data.

Category	Subcategory	Name	Symbol
Stocks	Technology	Apple Inc.	AAPL
		Microsoft Corporation	MSFT
		Alphabet Inc.	GOOGL
	Automotive	Tesla, Inc.	TSLA
		General Motors Company	GM
		Ford Motor Company	F
	Consumer Goods	Procter & Gamble Co.	PG
		The Coca-Cola Company	KO
	Bonds	Government	US Treasury 10 Year Bond
US Treasury 2 Year Bond			UST2Y
Corporate		Apple Inc. 5 Year Bond	AAPL5Y
		Microsoft Corp. 10 Year Bond	MSFT10Y
Municipal		California Municipal 20 Year Bond	CAMUNI20Y
		New York Municipal 5 Year Bond	NYMUNI5Y

The table above reads better than the table below because it uses merged cells for identical values, reducing repetition and clutter, which simplifies the data presentation and improves overall readability.

Category	Subcategory	Name	Symbol
Stocks	Technology	Apple Inc.	AAPL
Stocks	Technology	Microsoft Corporation	MSFT
Stocks	Technology	Alphabet Inc.	GOOGL
Stocks	Automotive	Tesla, Inc.	TSLA
Stocks	Automotive	General Motors Company	GM
Stocks	Automotive	Ford Motor Company	F
Stocks	Consumer Goods	Procter & Gamble Co.	PG
Stocks	Consumer Goods	The Coca-Cola Company	KO
Bonds	Government	US Treasury 10 Year Bond	UST10Y
Bonds	Government	US Treasury 2 Year Bond	UST2Y
Bonds	Corporate	Apple Inc. 5 Year Bond	AAPL5Y
Bonds	Corporate	Microsoft Corp. 10 Year Bond	MSFT10Y
Bonds	Municipal	California Municipal 20 Year Bond	CAMUNI20Y
Bonds	Municipal	New York Municipal 5 Year Bond	NYMUNI5Y

Charts

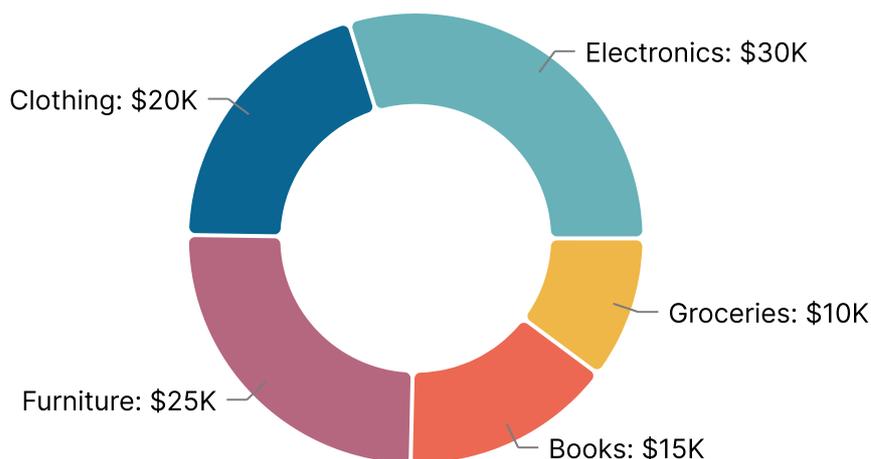
Charts are an integral tool in reports, providing a visual representation of data that can enhance comprehension and communication of complex information. They enable quick assimilation of trends, patterns, and outliers, which might be less apparent in text-based data.

Common types of charts include bar graphs, line charts, pie charts, and scatter plots, each suited for different kinds of data analysis. For instance, bar graphs are excellent for comparing quantities across different categories, line charts are ideal for showing changes over time, pie charts give a quick snapshot of proportions within a whole, and scatter plots help in identifying correlations between variables.

By including charts, reports become more engaging and actionable, facilitating better decision-making by clearly illustrating key insights and data points.

Pie Charts

Pie charts are a visual tool used in reporting to illustrate the proportional distribution of categories within a dataset as segments of a circle. Each segment represents a category's contribution to the whole, making pie charts ideal for displaying percentage or relative size relationships among a small number of groups. Their simplicity and clarity make them especially effective in highlighting dominant segments at a glance.



Inner Radius

Using inner and outer radii in pie charts allows for varied visual styles, such as creating a donut-shaped chart by increasing the inner radius. This modification separates the center of the pie, emphasizing the segments distinctly and enhancing readability.



Angle and Start

Adjusting the start angle and configuring the pie chart to span a 180-degree angle can shift the orientation of the chart, creating a semi-circle display that effectively highlights data comparisons from a different perspective.



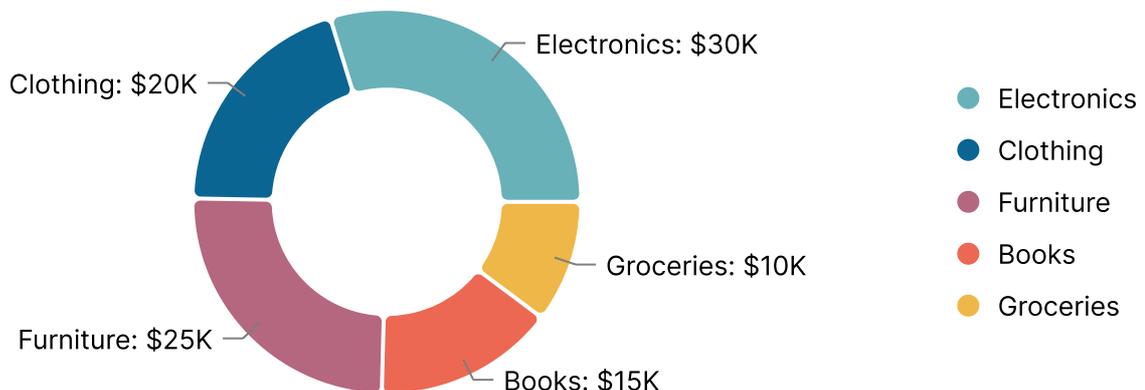
Gap and Border Radius

Introducing gaps between the slices and applying a border radius to soften sharp corners makes pie charts more aesthetically pleasing.



Legend and Labels

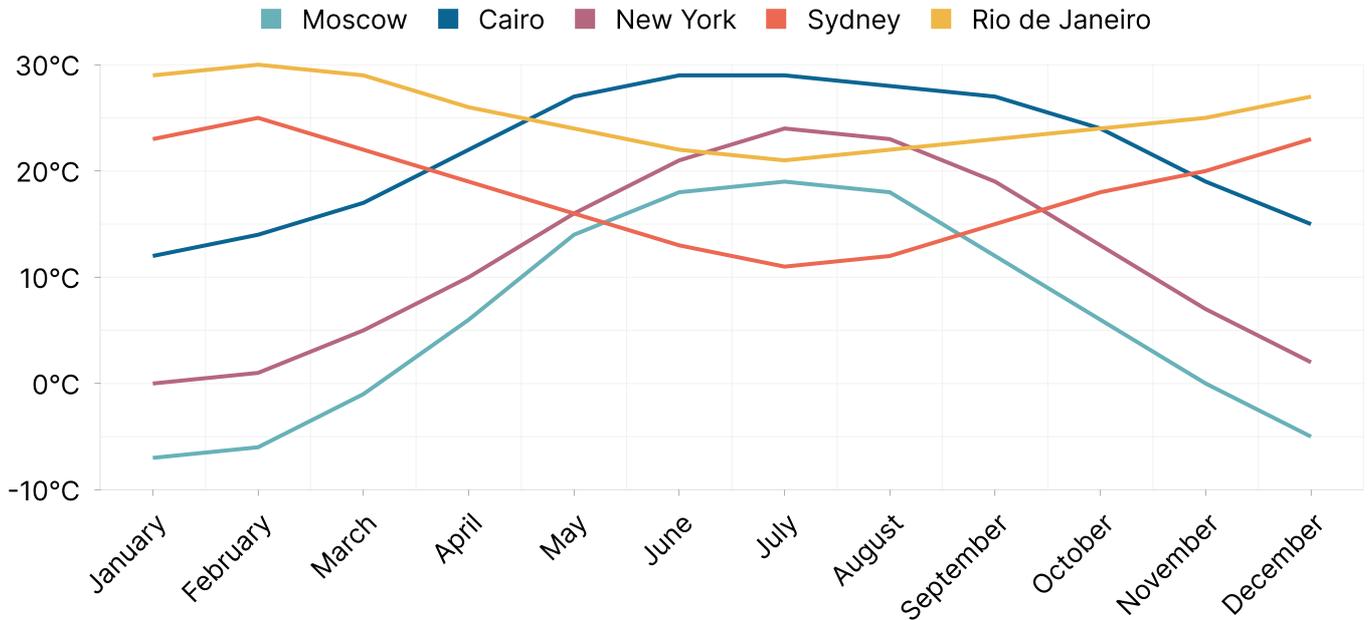
Legends or labels can be used alongside pie charts to clearly identify and describe the data represented by each segment, enhancing the chart's readability and informational value.



Line Charts

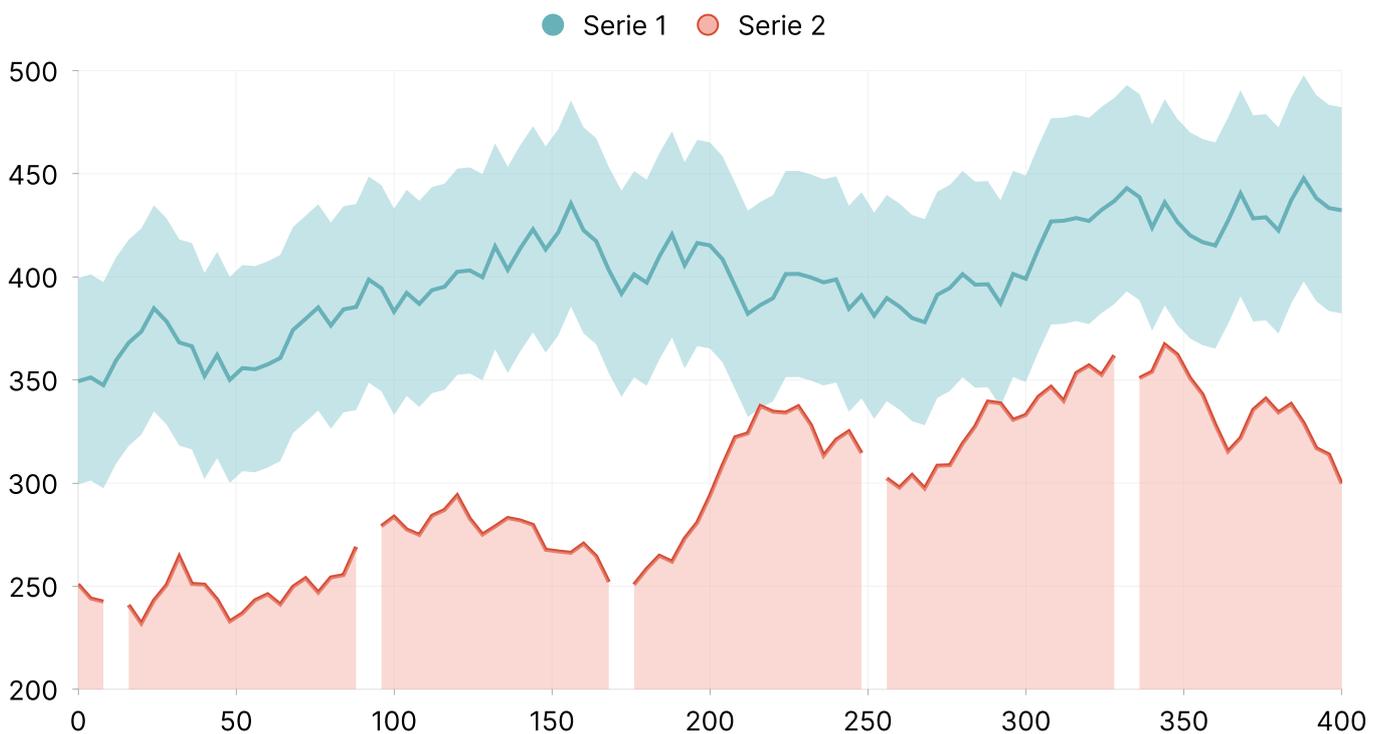
Line charts are a type of graphical representation used to display information as a series of data points connected by straight line segments. They are particularly effective for showing trends over time (time series), allowing viewers to quickly see changes and patterns.

The simplicity and clarity of line charts make them an excellent choice for comparing multiple series over the same time period, as they can effectively communicate the rise and fall of values within a compact and intuitive visual format.



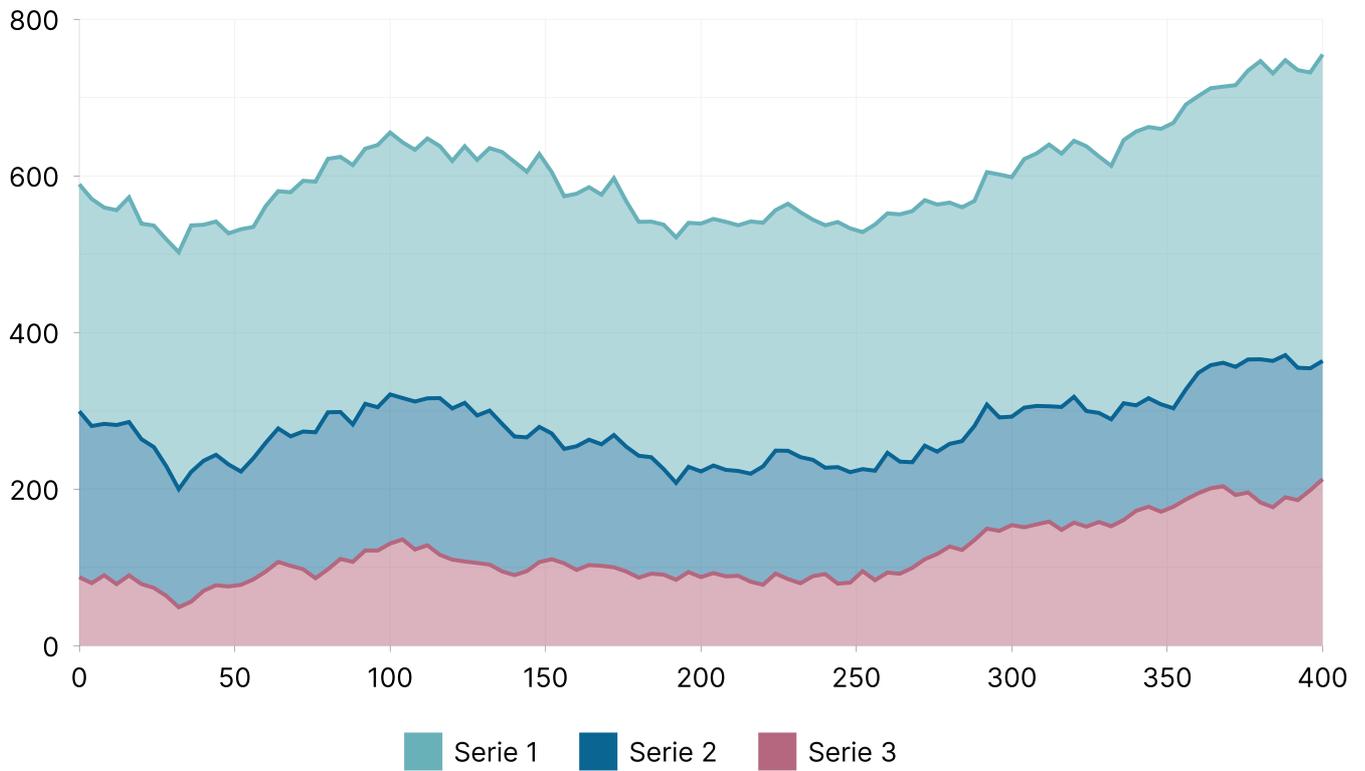
Area

Area graphs are ideal for showcasing bands by shading the area between two lines, effectively highlighting the range and variability of data within specified boundaries.



Stacked Lines

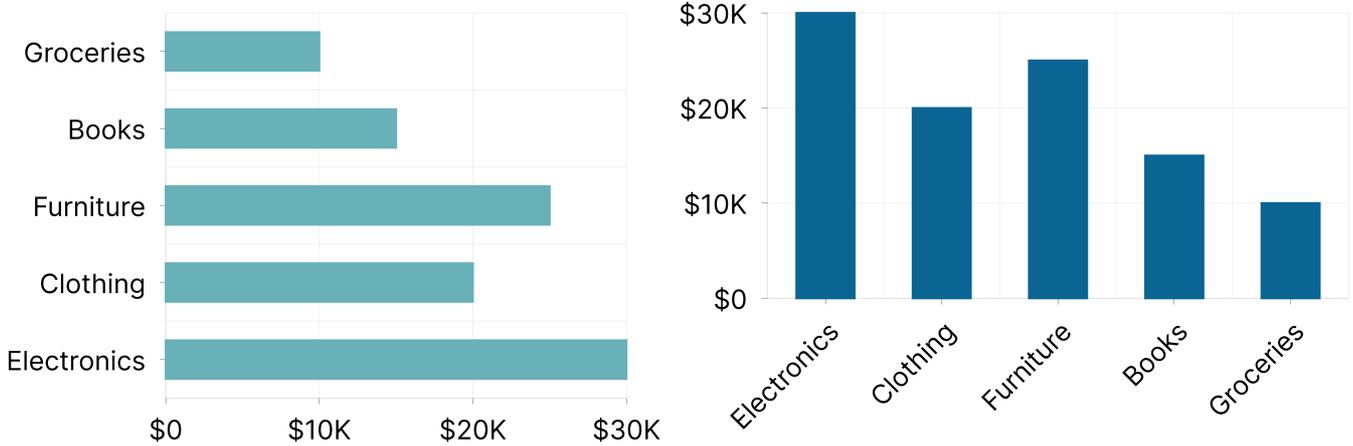
Stacked line charts are used to display the cumulative contribution of multiple data series to a total over time, allowing for easy comparison of individual components while visualizing overall trends.



Bars and Columns

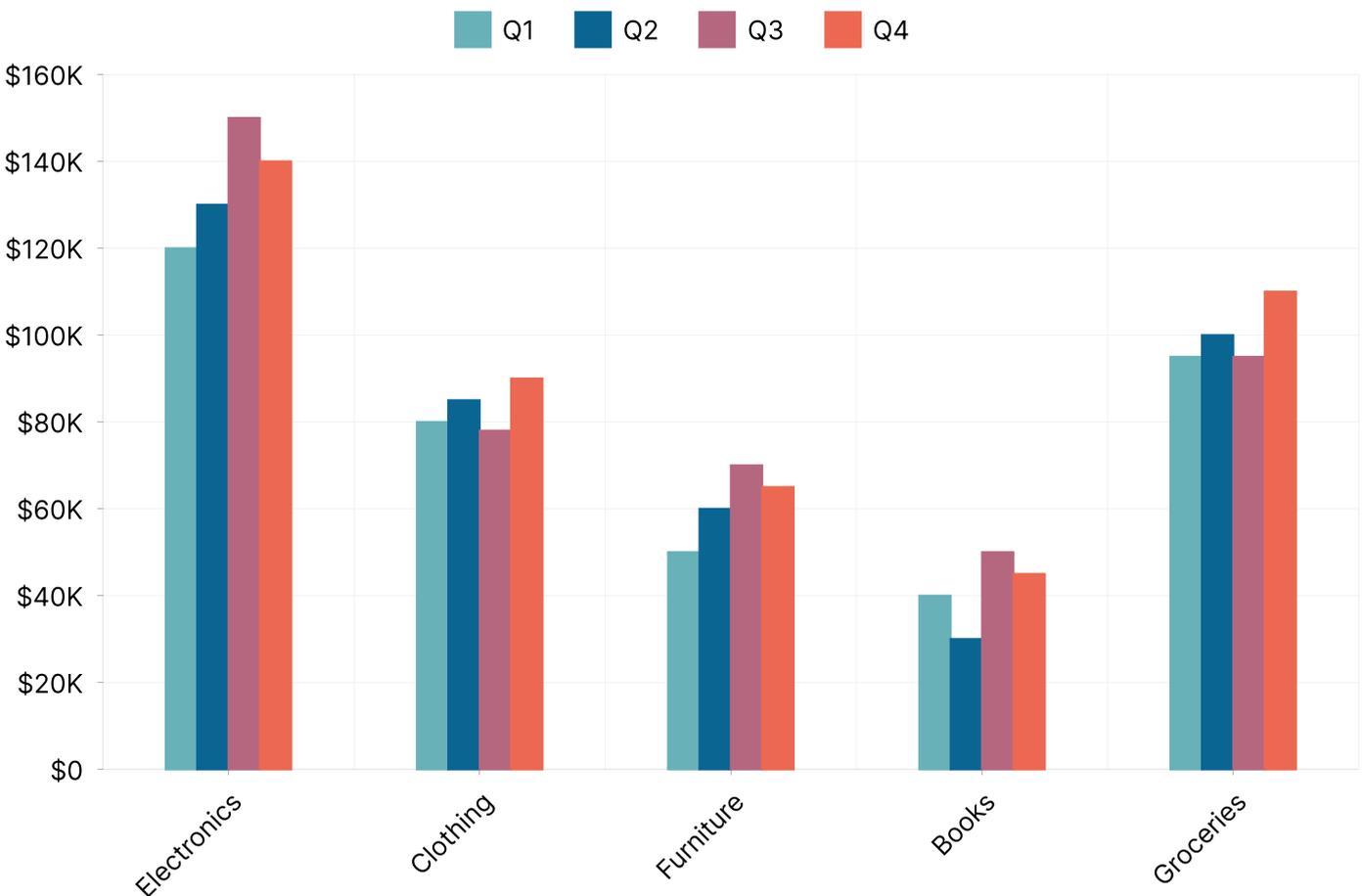
Bar and column charts are powerful visual tools used extensively in data visualization to compare the magnitude of values across different categories. Bar charts display data horizontally with bars extending along the x-axis, while column charts represent data vertically, with bars stretching along the y-axis.

These charts are particularly effective for showing variations in numbers among discrete categories, making it easy to see which categories are highest or lowest and by how much.



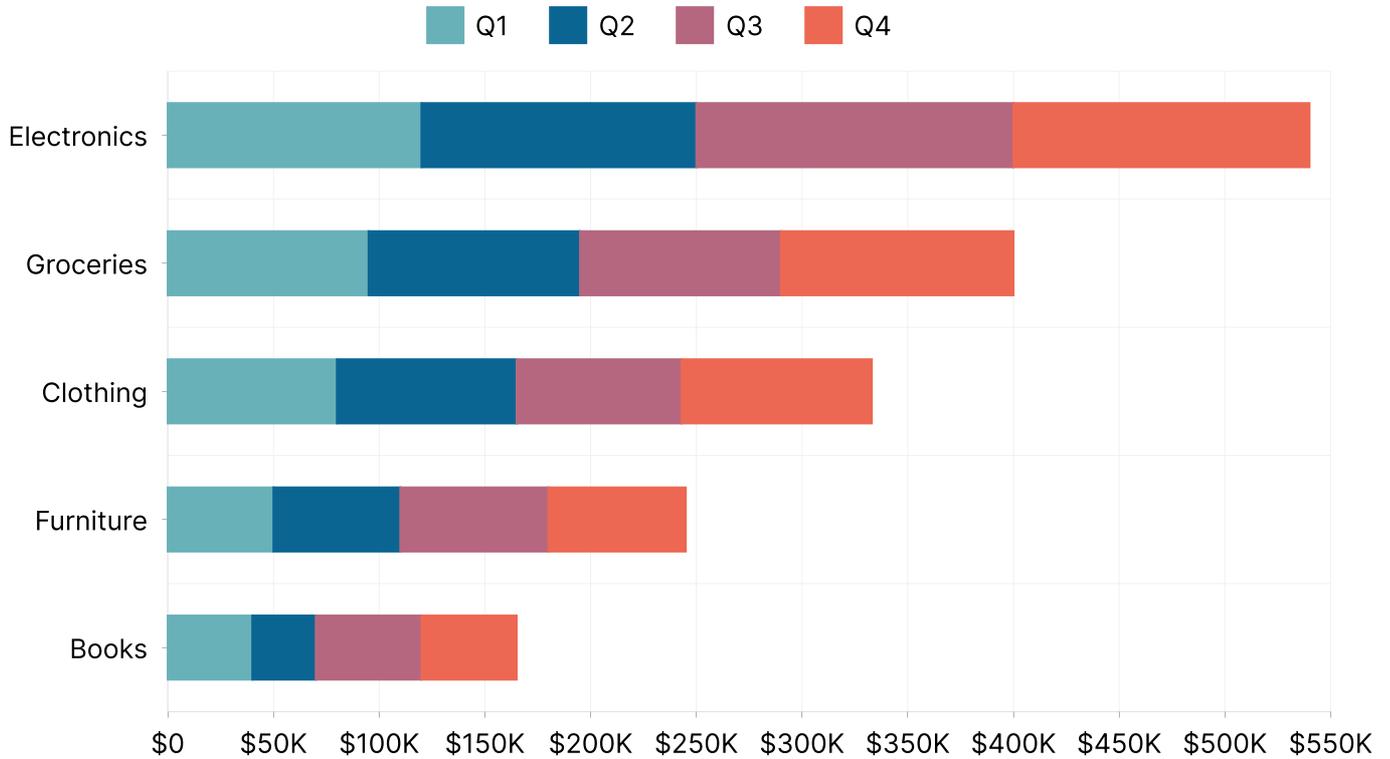
Size and Offset

Multiple bars or columns can be displayed alongside each other in a chart by specifying their size and offset properties, which allows for the precise adjustment of bar width and positioning, enabling clear and effective comparison between different data series.

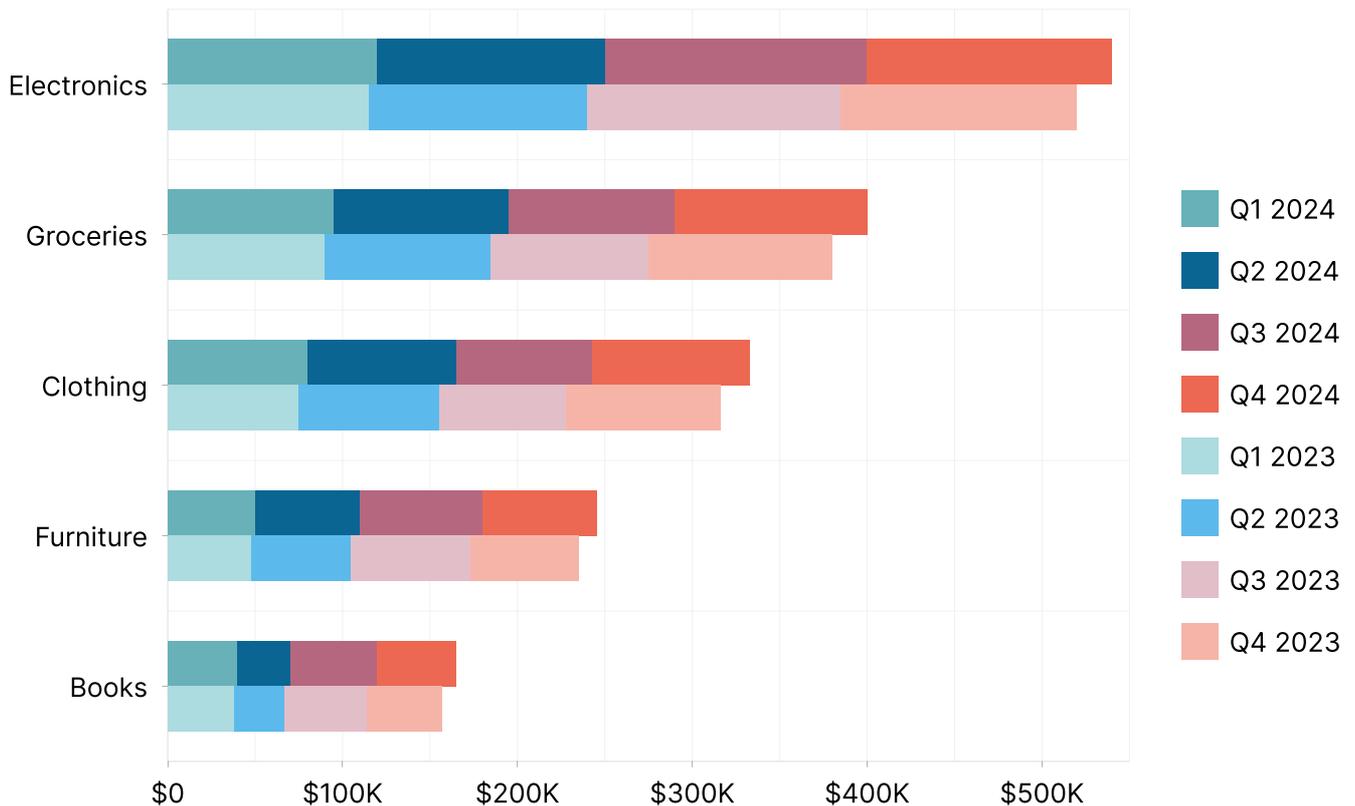


Stacking

Stacking is commonly used with bar and column charts to display the cumulative totals of multiple data series on the same axis, providing a clear visual representation of how each part contributes to the whole.



Multiple stacks can be used on a chart to represent distinct groups of data side by side, allowing for a detailed comparison of various data sets within the same visual space, each differentiated by its own unique stack.



Visual Elements

Visual elements like images, barcodes, QR codes, and badges significantly enhance reports by adding visual appeal and functionality.

Images

Images play a crucial role in enhancing reports by providing visual evidence, breaking up text, and illustrating complex ideas in a more digestible format. They can include photographs, diagrams, charts, and infographics, each serving to complement and clarify the written content.

Effective use of images can capture the reader's attention, aid in their understanding of the data or concepts being discussed, and add aesthetic value to the report. When strategically placed, images not only make the report more engaging but also facilitate better retention of information by providing visual anchors for the readers' memories.



QR Codes

QR codes, or Quick Response codes, are two-dimensional barcodes that can store a wide variety of information, from URLs to contact details, within their matrix-like structure. These codes have gained immense popularity due to their quick readability and large storage capacity compared to traditional UPC barcodes. Users can scan QR codes using smartphone cameras or dedicated QR scanning devices, which then direct them to websites, reveal text messages, or even initiate downloads and transactions. Their versatility and ease of use have led to widespread adoption in various fields, including marketing, where they bridge the gap between physical and digital realms, event ticketing, contactless payments, and in providing quick access to product information. The simplicity of generating and scanning QR codes has revolutionized how information is shared and accessed in our increasingly digital world.



Embedding Images Into QR Codes

Images can be embedded into QR codes by integrating a small logo or graphic into the center of the code, enhancing brand visibility while maintaining scanability.



Barcodes

Barcodes are a series of parallel lines of varying widths and spaces that represent numerical and sometimes alphanumeric data, designed for quick scanning by optical readers. They streamline the tracking, identification, and management of products, inventory, and information in retail, warehousing, and logistics.



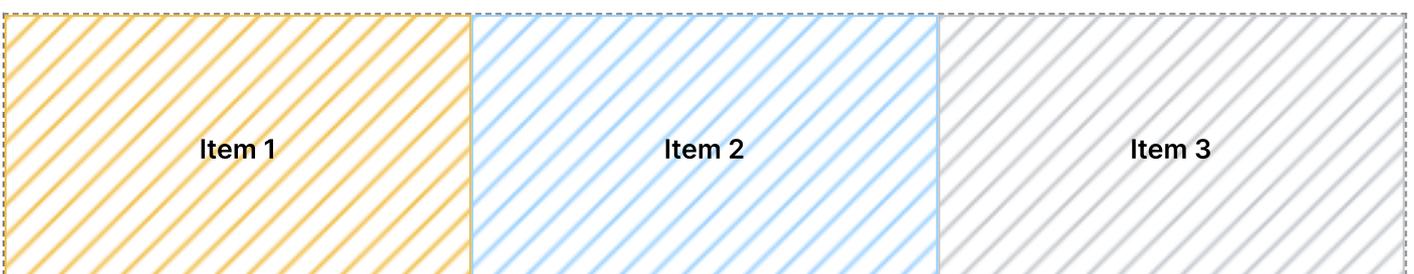
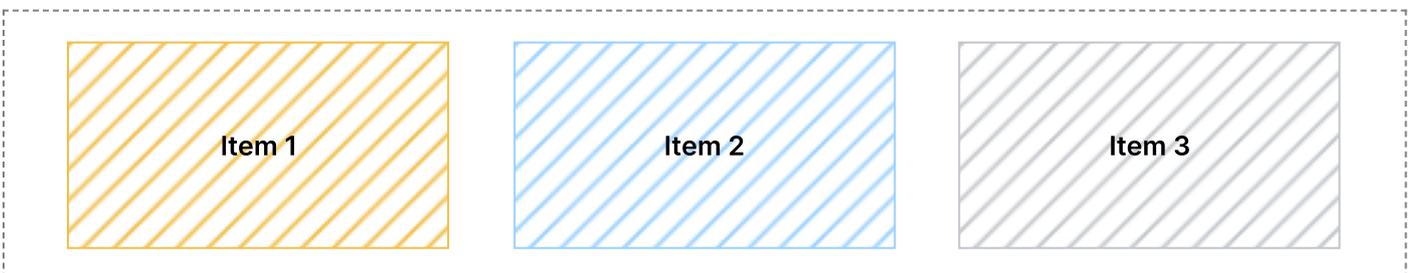
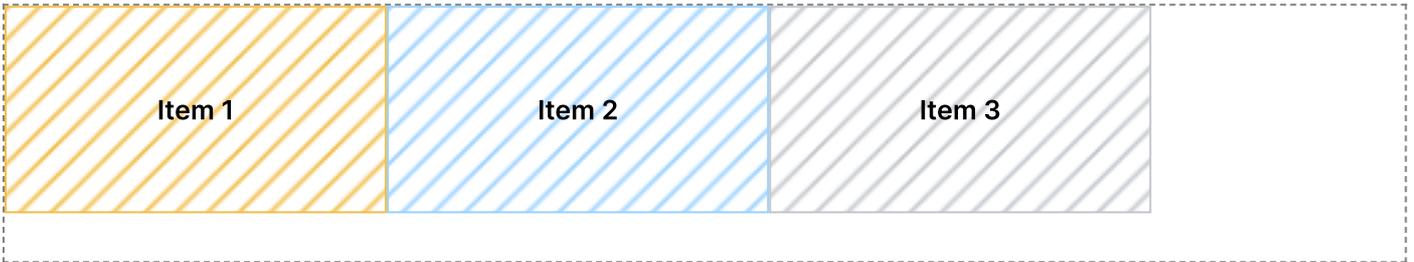
Features

Layout

Layout is essential for effectively communicating information in a structured and visually appealing manner.

Flows

Flow components, based on CSS flexbox, can be used to create various types of layouts, offering options to align content, distribute space, and adjust sizing dynamically. This makes them ideal for developing responsive and aesthetically pleasing page designs.



Data and Text

The complex interaction between data and text in digital content involves integrating dynamic, structured data with narrative text to enhance clarity and usability. This process typically uses dynamic text templates, which automatically populate with specific data points based on predefined rules.

Dynamic Text

Text templates use curly bracket placeholders to define where and how data should be inserted, allowing for dynamic text generation. These placeholders, often accompanied by formatting options, specify how to display different types of data such as dates, numbers, or strings. When combined with actual data, these templates are transformed into the final text, seamlessly integrating the specified values into a formatted output that adheres to predefined styles and structures.

Dear `{${data.order.customerName}}`,

Thank you for your purchase of `{${data.order.productName}}` on `{${data.order.purchaseDate:date}}`. The total amount charged was `{${data.order.amount:currency;USD;2}}`.

Best regards,
`{${data.order.sellerName}}`

+

```
{  
  "customerName": "John Doe",  
  "productName": "Wireless Keyboard",  
  "purchaseDate": "April 10, 2024",  
  "totalAmount": 45,  
  "sellerName": "Tech Gadgets Inc."  
}
```

=

Dear John Doe,

Thank you for your purchase of Wireless Keyboard on 04/10/2024. The total amount charged was \$45.00.

Best regards,
Tech Gadgets Inc.

Data Formats

There are numerous formats for presenting dates, numbers, currencies, and text, each tailored to specific functional requirements.

Format	Description	Unformatted Value	Formatted Value
Number formats			
n;2	Two decimals	1537.2598	1,537.26
n;0	No decimals	1537.2598	1,537
n;6	High precision (6 digits)	1537.2598	1,537.259800
n;2;6	Flex precision (min 2, max 6 decimals)	1537.2598	1,537.2598
number;0;2;c	Compact Number	1537.2598	1.54K
zeropad;2	Zero pad (2 digits)	5	05
Percent formats			
p;2	Default	0.994587	99.46%
ps;2	Add percent sign	0.994587	0.99%
percentnosign;2	Hide percent sign	0.994587	99.46
p;0	No decimals	0.994587	99%
p;1	One decimal	0.994587	99.5%
Date formats			
d	Default	2024-04-18T22:46:27.639Z	04/19/2024
dt;MMMyy	Month name and Year	2024-04-18T22:46:27.639Z	Apr 24
dt;MMy	Month number and Year	2024-04-18T22:46:27.639Z	04/24
dt;MMMMyyyy	Long Month name and Year	2024-04-18T22:46:27.639Z	April 2024
dateq	Year Quarter	2024-04-18T22:46:27.639Z	Q2 2024
yearperiod;2	2 Years Period	2024-04-18T22:46:27.639Z	2024-2026
yearperiod;4	4 years Period	2024-04-18T22:46:27.639Z	2024-2028
Currency formats			
currency;;0;2	Currency (Default)	137890.95	\$137,890.95
currency;USD;0;2	Currency USD	137890.95	\$137,890.95
currency;EUR;0;2	Currency EUR	137890.95	€137,890.95
currency;USD;0;2;c	Compact Currency USD	137890.95	\$137.89K
currency;EUR;0;2;c	Compact Currency EUR	137890.95	€137.89K
Text formats			
suffix; kg	Suffix	15	15 kg
wrap;()	Wrap	Category	(Category)
ellipsis;10	Ellipsis	More than 10 letters	More th...
ellipsis;10;middle	Ellipsis (middle)	More than 10 letters	More...ers
ellipsis;10;start	Ellipsis (start)	More than 10 letters	...letters

Pagination

Pagination in reports is a critical design element that involves strategically dividing content across multiple pages to enhance readability and organization. This process includes the use of various page types such as cover pages, which introduce the report, and standard pages that carry the main content.

Page counting and numbering are essential for navigation, helping readers locate information quickly and reference material effectively. Proper pagination ensures that content is not only split appropriately to avoid overcrowding of text and graphics but also that transitions between sections are smooth and logical.

Additionally, special attention is given to elements like headers, footers, and page breaks to maintain a clean and professional layout throughout the document.

Page Types

Various page types function similarly to slide masters in PowerPoint, providing predefined templates that dictate the layout and design elements of different sections of a report. Each type of page serves a specific purpose and includes prearranged components that streamline the document creation process:

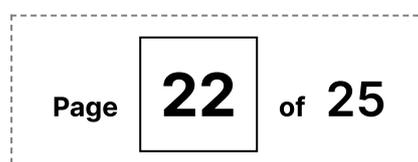
1. **Cover Pages:** Serve as the front face of the report, often including the title, subtitle, author, and date. This page sets the tone and presents the report's main theme or focus.
2. **Standard Pages:** These are the workhorse pages where most of the report's content resides. They typically have a consistent layout that may include headers, footers, and designated areas for text and graphics.
3. **Back Pages:** The final pages of the report which may include acknowledgments, contact information, or an "About" section detailing the organization or individuals behind the report.
4. **Rotated (Landscape) Pages:** Used for large tables or graphics that fit better in a landscape orientation. These pages are rotated to accommodate wider content.
5. **Blank Pages:** Often inserted for aesthetic or printing purposes, ensuring that new chapters start on the right side of a printed book, or simply to create visual breaks in the document.
6. **Chapter Pages:** Mark the beginning of each major section or chapter, often featuring a unique layout that might include a chapter title, introduction, or summary.
7. **Disclaimer Pages:** Used to provide legal disclaimers, privacy policies, or copyright information, typically located at the beginning or end of a report.

Each of these page types is equipped with specific placeholders for text and other content, allowing users to simply fill in their specific information while adhering to the established design format.

The nature and needs of the content often dictate the introduction of specific page types such as **Photo Spread** pages, **Two-Column Layout** pages, **Margin Notes** pages, **Pull Quote** pages, etc. When these layouts occur frequently within a document, it is efficient and practical to standardize them as distinct page types. This approach avoids the redundancy of setting up the same layout multiple times and ensures consistency across the document.

Page Counting

Page number and page count are accessible through variables `$page.number` and `$report.pageCount`. These can be seamlessly integrated with text content and formatted according to specific style requirements.



Rotated Pages

Rotated pages are a practical design solution in documents where certain content, such as wide tables, extensive charts, or large images, does not comfortably fit within the standard page orientation—be it portrait or landscape.

By rotating these pages, typically to a landscape orientation when the default is portrait, or vice versa, report designers can better utilize the available space, ensuring that the content is displayed clearly and in full without compromising the layout integrity.

This technique not only enhances the presentation of detailed data or large visual elements but also improves readability and user engagement by accommodating the natural dimensions of the content.

Date	Type	Asset Class	Asset Name	Quantity	Price Per Unit	Total Amount	Broker	Commission	Net Amount	Purpose
06/09/2024	Buy	Real Estate	Residential Properties	732	\$144	\$474,362	Broker C	\$560	\$474,923	Growth
05/15/2024	Sell	Alternative Investments	Commodities	326	\$251	\$476,986	Broker B	\$715	\$476,272	Rebalancing
05/11/2024	Sell	Real Estate	Commercial Properties	104	\$256	\$437,653	Broker B	\$776	\$436,877	Rebalancing
06/29/2024	Buy	Alternative Investments	Private Equity	535	\$217	\$254,175	Broker B	\$94	\$254,270	Diversification
05/08/2024	Buy	Alternative Investments	Commodities	160	\$77	\$421,493	Broker C	\$40	\$421,533	Income
04/10/2024	Buy	Alternative Investments	Hedge Funds	306	\$232	\$288,005	Broker B	\$151	\$288,157	Growth
05/29/2024	Buy	Real Estate	Commercial Properties	555	\$168	\$492,138	Broker A	\$246	\$492,384	Income
04/20/2024	Sell	Alternative Investments	Commodities	660	\$191	\$136,483	Broker A	\$14	\$136,469	Diversification
04/28/2024	Sell	Real Estate	Residential Properties	309	\$228	\$322,517	Broker A	\$475	\$322,042	Diversification
05/05/2024	Buy	Alternative Investments	Hedge Funds	855	\$152	\$266,099	Broker A	\$999	\$267,097	Rebalancing
04/17/2024	Buy	Real Estate	Residential Properties	126	\$285	\$419,331	Broker A	\$59	\$419,390	Rebalancing
04/12/2024	Sell	Alternative Investments	Private Equity	946	\$51	\$450,008	Broker B	\$275	\$449,733	Growth
06/20/2024	Buy	Real Estate	Residential Properties	131	\$122	\$62,799	Broker B	\$710	\$63,509	Diversification
04/15/2024	Buy	Real Estate	Residential Properties	793	\$242	\$60,464	Broker A	\$537	\$61,001	Diversification
05/16/2024	Sell	Bonds	Municipal Bonds	205	\$107	\$378,098	Broker B	\$560	\$377,538	Rebalancing
05/07/2024	Buy	Real Estate	Commercial Properties	573	\$241	\$188,004	Broker A	\$592	\$188,595	Growth
06/15/2024	Sell	Real Estate	Commercial Properties	36	\$160	\$343,489	Broker B	\$574	\$342,915	Diversification

Date	Type	Asset Class	Asset Name	Quantity	Price Per Unit	Total Amount	Broker	Commission	Net Amount	Purpose
04/10/2024	Sell	Real Estate	Commercial Properties	234	\$170	\$150,383	Broker C	\$971	\$149,412	Growth
05/22/2024	Buy	Equities	EnviroResource Ltd	686	\$143	\$260,036	Broker A	\$725	\$260,761	Income
06/18/2024	Buy	Equities	Innovatech International	705	\$242	\$365,873	Broker C	\$684	\$366,557	Rebalancing
04/22/2024	Sell	Alternative Investments	Hedge Funds	758	\$232	\$494,542	Broker A	\$479	\$494,064	Growth
06/12/2024	Sell	Equities	Global Financiers	375	\$238	\$164,416	Broker B	\$871	\$163,545	Income
05/18/2024	Buy	Bonds	Government Bonds	50	\$112	\$48,981	Broker C	\$344	\$49,325	Income
05/04/2024	Buy	Alternative Investments	Commodities	433	\$137	\$488,275	Broker B	\$716	\$488,990	Rebalancing
04/23/2024	Sell	Alternative Investments	Hedge Funds	720	\$261	\$395,355	Broker C	\$810	\$394,544	Rebalancing
04/24/2024	Buy	Alternative Investments	Hedge Funds	1,000	\$54	\$248,737	Broker A	\$495	\$249,232	Growth
04/27/2024	Sell	Alternative Investments	Private Equity	810	\$150	\$274,168	Broker B	\$29	\$274,139	Income
06/17/2024	Sell	Real Estate	Commercial Properties	530	\$216	\$427,137	Broker A	\$537	\$426,600	Rebalancing
06/11/2024	Sell	Equities	HealthGen Solutions	773	\$227	\$14,487	Broker C	\$771	\$13,716	Diversification
05/29/2024	Buy	Real Estate	Commercial Properties	778	\$286	\$190,116	Broker C	\$606	\$190,722	Diversification
04/15/2024	Buy	Equities	Global Financiers	809	\$270	\$317,528	Broker C	\$894	\$318,421	Diversification
06/18/2024	Sell	Bonds	Municipal Bonds	545	\$172	\$485,551	Broker C	\$740	\$484,811	Growth
05/29/2024	Sell	Alternative Investments	Private Equity	702	\$79	\$75,189	Broker A	\$910	\$74,279	Rebalancing
05/03/2024	Sell	Equities	Global Financiers	870	\$183	\$54,218	Broker B	\$685	\$53,533	Diversification
04/18/2024	Buy	Bonds	Corporate Bonds	868	\$161	\$134,154	Broker B	\$122	\$134,275	Income
06/19/2024	Buy	Equities	Innovatech International	764	\$64	\$482,487	Broker B	\$867	\$483,354	Income
06/21/2024	Sell	Bonds	Corporate Bonds	631	\$88	\$219,317	Broker A	\$966	\$218,351	Rebalancing
05/28/2024	Sell	Equities	Global Financiers	729	\$288	\$111,525	Broker B	\$301	\$111,224	Growth
06/12/2024	Sell	Equities	Innovatech International	262	\$190	\$238,587	Broker C	\$375	\$238,212	Income
06/28/2024	Buy	Bonds	Municipal Bonds	771	\$180	\$24,080	Broker B	\$895	\$24,976	Diversification
06/20/2024	Buy	Alternative Investments	Private Equity	30	\$130	\$409,314	Broker B	\$791	\$410,105	Diversification
05/29/2024	Sell	Real Estate	Residential Properties	907	\$210	\$315,524	Broker C	\$886	\$314,638	Growth

Date	Type	Asset Class	Asset Name	Quantity	Price Per Unit	Total Amount	Broker	Commission	Net Amount	Purpose
06/15/2024	Sell	Bonds	Corporate Bonds	199	\$194	\$280,747	Broker C	\$663	\$280,084	Diversification
04/14/2024	Sell	Real Estate	Commercial Properties	289	\$216	\$215,280	Broker B	\$779	\$214,502	Growth
04/04/2024	Sell	Equities	HealthGen Solutions	12	\$79	\$167,513	Broker A	\$305	\$167,207	Growth
05/23/2024	Sell	Equities	Innovatech International	829	\$214	\$495,152	Broker A	\$220	\$494,932	Growth
06/08/2024	Sell	Equities	Innovatech International	777	\$93	\$14,392	Broker A	\$559	\$13,833	Rebalancing
06/28/2024	Buy	Equities	Global Financiers	706	\$81	\$468,110	Broker B	\$487	\$468,597	Rebalancing
05/13/2024	Buy	Equities	Global Financiers	135	\$238	\$167,627	Broker C	\$40	\$167,667	Growth
05/18/2024	Buy	Bonds	Government Bonds	547	\$137	\$400,498	Broker A	\$653	\$401,151	Growth
05/06/2024	Buy	Equities	Global Financiers	528	\$179	\$69,435	Broker B	\$462	\$69,897	Rebalancing
05/26/2024	Sell	Equities	EnviroResource Ltd	886	\$66	\$97,983	Broker A	\$516	\$97,467	Growth
05/23/2024	Sell	Real Estate	Residential Properties	534	\$221	\$392,915	Broker A	\$403	\$392,511	Growth
06/02/2024	Sell	Bonds	Corporate Bonds	556	\$253	\$456,502	Broker B	\$250	\$456,251	Diversification
04/04/2024	Sell	Bonds	Government Bonds	647	\$86	\$360,235	Broker A	\$614	\$359,621	Growth
05/21/2024	Buy	Bonds	Corporate Bonds	416	\$204	\$144,101	Broker B	\$987	\$145,089	Rebalancing
05/06/2024	Sell	Equities	HealthGen Solutions	106	\$256	\$340,458	Broker B	\$206	\$340,253	Growth
04/02/2024	Sell	Alternative Investments	Commodities	990	\$224	\$160,453	Broker B	\$544	\$159,909	Income
04/08/2024	Buy	Equities	HealthGen Solutions	390	\$103	\$319,094	Broker A	\$274	\$319,368	Income
04/07/2024	Buy	Alternative Investments	Commodities	574	\$81	\$181,008	Broker C	\$883	\$181,891	Growth

Page Breaking

It can be challenging to predict the exact amount of space required, as tables or dynamic text can vary significantly in length depending on the content. Tables might expand with additional rows as data is added, and text blocks can grow as variables within the text are populated with real-time data.

This variability necessitates a flexible approach to page layout, where content may need to be dynamically broken into multiple pages to accommodate its expansion without compromising the document's readability or aesthetic integrity.



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