

GAINING AN EDGE

ENHANCING PORTFOLIO STRATEGY THROUGH DIGITAL INNOVATION





Opening Thoughts

Quantifeed collaborates with some of the world's largest financial firms, delivering leading-edge technologies that boost operational efficiency, and drive additional revenue.

We have recently been working with portfolio strategists helping them to deepen the relationship with their clients who are financial advisor groups and other wealth management businesses.

Here are some ways to show how we have significantly impacted the business model helping them to improve their competitive edge.

Challenge

Delivering multiple "families" of model portfolios to a growing client base of independent financial advisor groups

Solution

Quantifeed's Architect provides the portfolio strategist with a robust tool to rapidly build a "family" of model portfolios for an advisor group. This scalable solution allows teams to seamlessly access real-time data from global market data providers and internal sources. A wide variety of allocation engines, enable quick and accurate creation of a series of model portfolios from low to high risk. Tasks that previously took days can now be completed in a fraction of the time.



Benefits

- **Elimination of Manual Processes:** Architect replaces cumbersome, error-prone manual tasks, reducing reliance on Excel worksheets and improving output accuracy
- **Cloud-based Efficiency:** Workflows can be shared and supervised from anywhere, with all data processing reflected in real-time
- **Integrated Teamwork:** Facilitates easier sharing and monitoring of work, allowing for better resource allocation and the ability to grow without additional headcount

Challenge

Engaging CIOs in the model portfolio creation process has been time consuming and unstructured

Solution

Quantifeed's Architect enables portfolio strategists to build and then easily share model portfolios within their CIO suite. The CIO can log into Architect and review the proposed portfolios. This streamlines the process of arriving at a finalized set of portfolios. The abundance of analytics and risk metrics available online to the CIO has reduced the time for model portfolio development from months to, in many cases, less than a week.

Benefits

- Efficient sharing: A single platform with logins for multiple users
- More analytics: Easy viewing, analysis, and comparison of different investments, with the ability to adjust choices on the fly
- Audit trail: Automated tracking of portfolio development and iterative adjustments



Challenge

Putting up-to-date model portfolio fact sheets and data in the hands of advisors



Solution

Portfolio strategists also have access to the CIO's published model portfolios through a dedicated visualizer portal. Here, they can see the updated performance, constituents and risk analytics of their firm's model portfolios. Immediately producing an up-to-date portfolio factsheet or comparison between a number of portfolios makes preparing for meetings faster and easier.

Benefits

- **Relevant data:** Advisors can be ready for client meetings with the latest market movements
- **Reduced Research Time:** Easy viewing, analysis, and comparison of different investments, with the ability to adjust choices on the fly
- **Easy Proposal Creation:** Aggregated data and AI-generated text reduce manual effort, significantly cutting down the proposal preparation process from days to minutes



Closing Comments

Quantifeed's Architect solution helps portfolio strategists scale their business by efficiently managing multiple model portfolios for various advisor groups. This advanced technology enhances productivity and revenue generation, allowing consultants to service more clients and build more portfolios without expanding their team, ultimately increasing market share and profitability.

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