

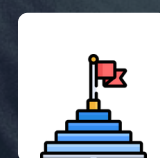
financial / simplicity

The global specialist in portfolio control systems

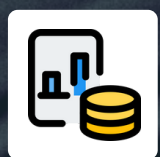
Financial Simplicity enables you to:



Save considerable time, effort and hence costs associated with the construction of model portfolios for different audiences



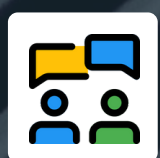
Unconstrain your model portfolio operations so that you can take on more business without concerns around delivery and service levels



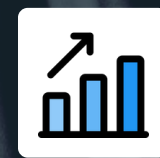
Easily implement a robust set of processes and controls to minimise business risks associated with the construction and communication of model portfolios



Maximise investment returns by streamlining the end to end process from investment research findings to model portfolio implementation



Easily implement a roles based set of workflows to increase security and process quality across teams working on model portfolios



Re-use investment research componentry to generate multiple model portfolio derivations with single updates

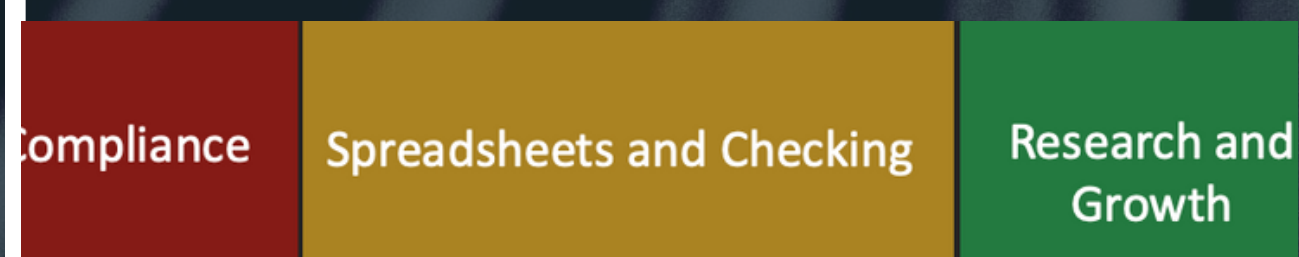


Monitor model portfolio composition to agreed mandates with alerts



Enhance audit capabilities with model portfolio version and change controls

Redefine the cost base & service focus of your business.



Without Financial Simplicity



With Financial Simplicity

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About

Financial Simplicity's portfolio control systems resolve the time-consuming, complex problems, and removes the difficult manual calculations, that are characteristic in delivering mass tailored investment propositions.

Financial Simplicity's unique techniques and algorithms incorporate all aspects of your investment approach and allow reusable components to be merged and adapted into specific model portfolios.

In many businesses, Financial Simplicity replaces the function of spreadsheets (and many of the associated processes), providing an enterprise solution to personalised and adapted model portfolios yet allowing the business to retain the uniqueness of each firm.

The outcomes achieved using our proven approach, philosophy and methodology to mass personalised portfolio management are one or more of:

- enhanced investment proposition by removing constraints associated with spreadsheets
- better use of resources for improved efficiency and allocation to higher value activities
- better process definition and implementation for faster and higher quality outputs
- reduced business risks through a combination of algorithmic workflows and constant monitoring
- ability to grow and scale businesses with high level of systemisation without compromise
- better working environment with higher employee satisfaction and reduced stress

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