QUANTIFEED
The wealthcare experts

Explore our Discretionary Portfolio Management Solution

Scale your DPM business by introducing intelligent automation to access new customer segments, introduce efficiencies and controls, and improve customer experience

DPM businesses struggle to scale due to poorly integrated systems, resource-intensive processes and lack of digital channels

Challenges

High servicing costs with low-value customers serviced at a loss

Missing revenue opportunity from other customer segments as service is typically limited to HNW individuals

Lack of digital channels to service low-value and digital-savvy customers

Manual order calculation and submission lead to poor resource utilization

Manual processes for portfolio customisation introduce operational and compliance risks

Inefficient order management can lead to excessive trading, high cost and poor customer experience

Quantifeed scales a financial institution's DPM business with intelligent automation

Access new customer segments

Introduce efficiencies and controls in portfolio management and trading

Improve customer servicing

Quantifeed's DPM Solution

QEngine Customer application

- QEngine Customer application or APIs to power customer platforms
- Support multiple investment propositions, solutions and journeys

QEngine Portfolio Manager application

- QEngine Portfolio Manager application or APIs to support portfolio manager workflows and e2e journeys
- Manage model portfolios
- Manage, rebalance and view customer portfolios

QEngine Advisor application

- QEngine Advisor application or APIs to support advisor workflows and e2e journeys
- Customer onboarding, advice, proposal, implementation and servicing

Order management

- Automation of order generation and management
- Support straight through processing of orders/trade with minimal manual intervention

Smart rebalancing

- Bulk (i.e. mass) or single rebalancing of customer portfolios
- Algorithms to optimize for drift, portfolio performance and customer experience
- Algorithms for optimizing top-up and withdrawal instructions

Connectivity to existing systems

- Leverage existing systems and databases – including core wealth system, market data, and CRM system

Benefits

Minimize manual processing by allowing bulk rebalancing	**Create and rebalance model portfolios** within compliance constraints using model portfolio integrity checks	**Easily match a customer to a suitable model portfolio** – recommendation engine based on customer's risk and goal preferences
Allow for customization within pre-configured boundaries/controls	**Intelligent automation** to minimize manual work and mitigate operational and compliance risks	**Automatically generate orders** based on investment recommendations and the customer's existing positions
Intelligent order generation to minimize drift, excessive trading and portfolio "locking" due to pending transactions	**Connectivity to back-office systems** for portfolio reconciliation and reporting	**Acquire and service customers** more efficiently, especially low-value customers or those wanting a more digital experience

Why Quantifeed

A powerful, modular, customisable solution to address a range of needs

Making the complex **simple**

A team you can trust with a track record of delivery

Looking for new digital wealth management solutions to boost your business?

Email us at **sales@quantifeed.com**
or visit **https://www.quantifeed.com**