

Momentum Analytics That Maximize Returns and Reduce Risk



Trendrating Solutions for Active Managers

According to S&P Dow Jones Indices SPIVA® the vast majority of funds underperform their benchmark. Most of these funds lack the inclusion of momentum factor analytics.

Superior performance is about capturing trends. A simple overlay of a sound momentum model can contribute to maximize returns while lowering risks. Momentum is a strong and persistent factor well documented by prominent academics. Momentum is a perfect complement to fundamental strategies as it is negatively correlated to value investing. Momentum is also a disciplined methodology to help neutralize the “disposition effect” to let profits run while cutting losses sooner. Trendrating’s trusted analytics and applications make adding momentum to any investment strategy fast and easy.

Benefits for Active Managers

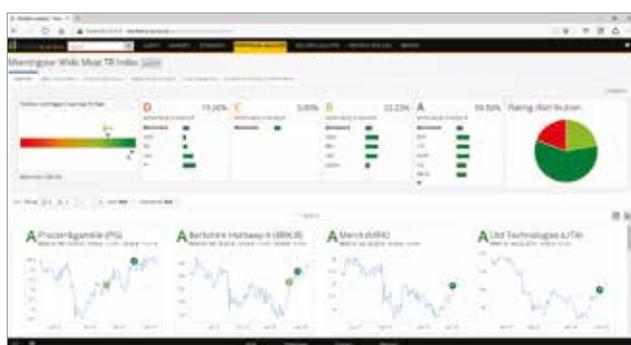
- Actionable momentum ratings (A,B,C,D) on over 15,000 global equities, indices, sectors, ETFs, currencies and commodities across 50 countries
- Next generation of Momentum models which reduces the drawbacks of old school methodologies
- Easily incorporate momentum into most investment decision processes
- Adopted by 100+ customers and chosen by FTSE Russell to create a new series of momentum indices

Supported Tasks

- Validate investment ideas
- Screen the market for new opportunities
- Measure and compare market momentum across countries and sector
- Use momentum as an additional selection criteria (alpha)
- Use momentum to optimize tactical allocation (smart beta)
- Create, test and optimize momentum strategies as an overlay to existing portfolios
- Spot momentum reversals early with daily alerts on your entire universe
- Easily import portfolios and export analytics

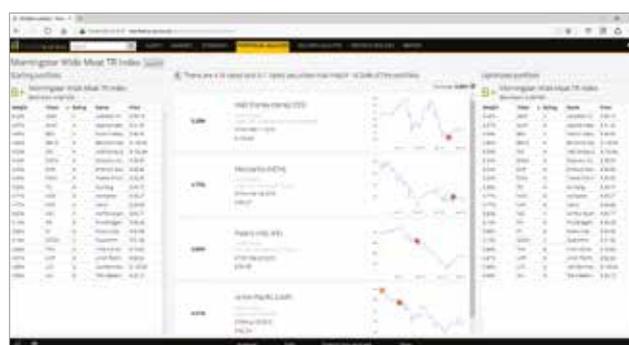
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Portfolio Analyzer



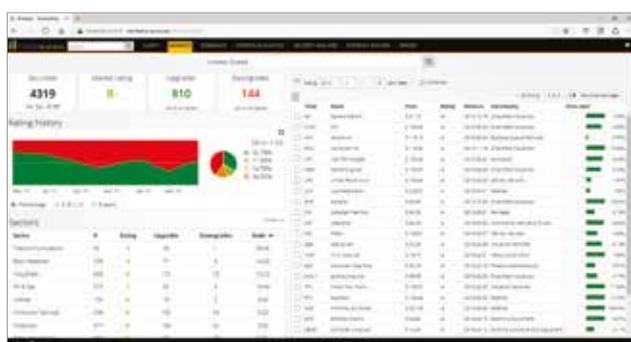
Leverage our robust momentum model to run regular health checks on your portfolios and objectively spot the best & worst trends.

Portfolio Optimizer



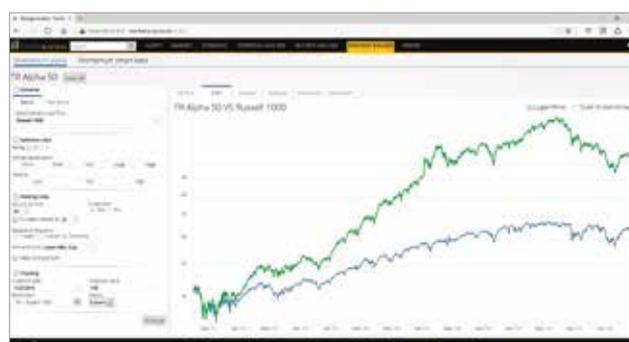
Run personalized momentum strategies on your portfolio holdings for optimal asset allocation.

Markets Analyzer



See the big picture of where momentum is shifting globally or by sector or sub-industry to create rotation strategies.

Strategy Builder



Gives you the power to easily design and test complex momentum alpha and smart beta strategies that leverage Trendrating's advanced algorithms in an intuitive codeless interface.