

Take Your Trading Platform to the Next Level with Actionable Momentum Analytics



Trendrating Solutions for Online Brokers

According to Celent, in order to remain competitive in the industry, online brokerage firms must continue to develop new strategies to attract and retain higher-value accounts, as well as active investors and traders.

eBrokers have started offering investors a more actively managed approach (“Momentum Portfolios”) in addition to other factor-based portfolios, signaling a broader industry move away from passive investing.

Benefits for Online Brokers

- Actionable ratings on over 15,000 global equities, indices, sectors, ETFs, currencies & commodities across 50 countries
- Momentum historically outperforms other investment factors, with higher risk-adjusted returns (Sharpe ratio)
- Provides a unique source of actionable data which investors stand to profit from
- Increased revenue from more frequent customer trading if momentum strategy is rebalanced monthly
- Create premium offerings using the same ratings data chosen by FTSE Russell for their Momentum Indices

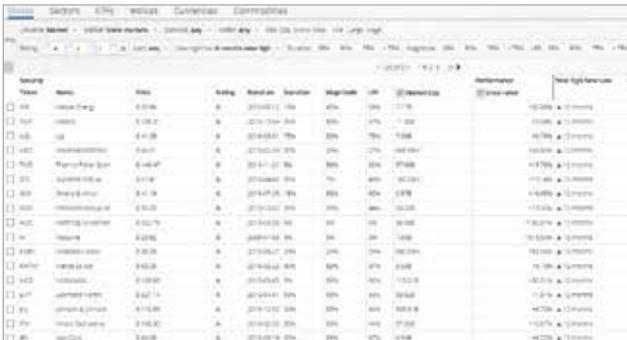
Benefits to Investors

- Unlock the potential of a robust momentum analysis to improve returns
- Quickly identify new developing trends for every stock and ETF
- Systematically incorporate the discipline of letting profits run and cutting losses early
- Select the winners from any market and sector.
- Receive daily alerts of key trend reversals
- Validate investment ideas
- Capitalize on momentum when fundamentals are out of line with market prices

Trendrating for Online Brokers

With access to our consolidated feed, brokers will gain access to detailed ratings information, including Valoren identifier, Exchange ISO code, Currency code, Ticker, ISIN code, Name type (Stock, Index, ETF...), Country ISO code, Currency ISO code, Rating, Date, Price, Numeric Rating, Previous numeric rating, UPI, Duration, Magnitude, Rating date, Previous Rating date, and more. Up to 15 years of historical ratings data is available by region (The Americas, EMEA, Asia Pacific). Below are examples of how to best incorporate our momentum ratings into your existing online platform.

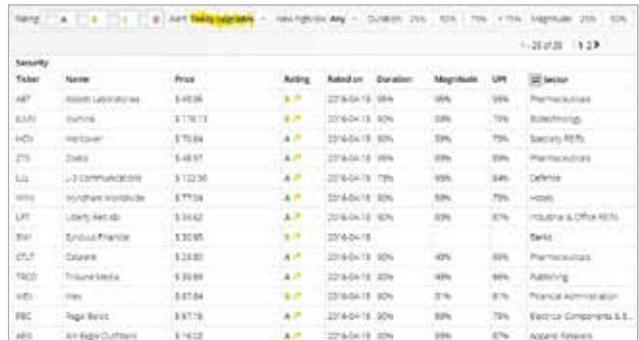
Screening



Name	Price	Rating	Rating Date	Duration	Magnitude	UPI	Previous Rating	Previous Rating Date	Next Rating Forecast
AA	10.00	A	2018-01-15	40%	100	1.10			10.00
AB	10.00	A	2018-01-15	50%	100	1.10			10.00
AC	10.00	A	2018-01-15	60%	100	1.10			10.00
AD	10.00	A	2018-01-15	70%	100	1.10			10.00
AE	10.00	A	2018-01-15	80%	100	1.10			10.00
AF	10.00	A	2018-01-15	90%	100	1.10			10.00
AG	10.00	A	2018-01-15	100%	100	1.10			10.00
AH	10.00	A	2018-01-15	110%	100	1.10			10.00
AI	10.00	A	2018-01-15	120%	100	1.10			10.00
AJ	10.00	A	2018-01-15	130%	100	1.10			10.00
AK	10.00	A	2018-01-15	140%	100	1.10			10.00
AL	10.00	A	2018-01-15	150%	100	1.10			10.00
AM	10.00	A	2018-01-15	160%	100	1.10			10.00
AN	10.00	A	2018-01-15	170%	100	1.10			10.00
AO	10.00	A	2018-01-15	180%	100	1.10			10.00
AP	10.00	A	2018-01-15	190%	100	1.10			10.00
AQ	10.00	A	2018-01-15	200%	100	1.10			10.00

Add Momentum Ratings to existing market screeners with over a dozen fields to choose from.

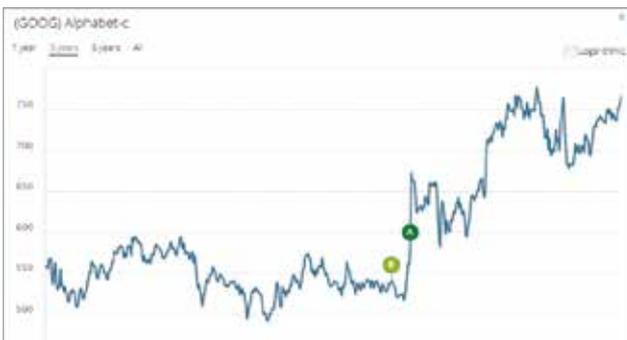
Alerts



Ticker	Name	Price	Rating	Rating Date	Duration	Magnitude	UPI	Sector
ABB	ABB Laboratories	\$48.98	A	2018-04-18	99%	99%	99%	Pharmaceuticals
ABB	ABB	\$178.13	A	2018-04-18	90%	99%	79%	Biotechnology
ABB	ABB	\$75.84	A	2018-04-18	90%	99%	79%	Security & Risk
ABB	ABB	\$48.97	A	2018-04-18	99%	99%	99%	Pharmaceuticals
ABB	ABB Communications	\$122.36	A	2018-04-18	79%	99%	94%	Defense
ABB	ABB Healthcare	\$77.94	A	2018-04-18	90%	99%	79%	Health
ABB	ABB Services	\$34.42	A	2018-04-18	90%	99%	97%	Health & Other MSAs
ABB	ABB Financial	\$30.95	A	2018-04-18				Bank
ABB	ABB	\$28.80	A	2018-04-18	90%	49%	99%	Pharmaceuticals
ABB	ABB	\$9.88	A	2018-04-18	90%	49%	99%	Publishing
ABB	ABB	\$87.84	A	2018-04-18	90%	97%	97%	Financial Administration
ABB	ABB	\$87.18	A	2018-04-18	90%	99%	79%	Special Companies & S.
ABB	ABB	\$16.02	A	2018-04-18	90%	99%	97%	Apparel Retailers

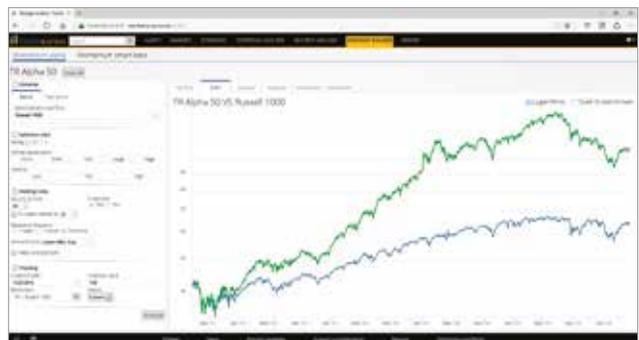
Incorporate momentum changes to securities in customer portfolios, baskets and watch lists.

Charts



Display momentum changes graphically in existing chart packages.

Index Builder (Trendrating App)



CIOs and Strategists can easily design and test complex momentum alpha, smart beta & sector rotation strategies that leverage Trendrating's advanced algorithms in our intuitive codeless interface.