

Impress Clients with the Industry's Most Accurate Momentum Analytics



Trendrating Solutions for Private Banks

According to Boston Consulting Group, the UHNW client demographic is growing more than twice as fast as any other category. This surge in business is resulting in a high demand for financial planning, investment management, lending and financial concierge services provided by private banking.

Despite a brisk business, private bankers also face challenges as their competition intensifies. Competition among local banks, universal banks, brokerages, advisers and family offices is fierce, and strong investment returns are crucial to maintaining and attracting new clients. Fast adoption of value-added technology applications is critical in the battle to deliver better returns.

Benefits for Private Banks

- Actionable ratings on over 15,000 global equities, indices, sectors, ETFs, currencies & commodities across 50 countries
- Expand the breadth and quality of service by incorporating intelligence that brings discipline, transparency and efficiency
- Improve the performance of the accounts you manage or advise
- Create personalized investment strategies and impress clients with robust statistical validation
- Advise clients using the same ratings data chosen by FTSE Russell for their Momentum Indices

Supported Tasks

- Run health checks across an unlimited number of portfolios and check daily alerts page to keep clients in the best performing investments
- Screen for momentum on thousands of stocks and to find the best performers while spotting trend reversals to sell the losers
- Construct your own strategies to tilt momentum alpha or smart beta as an overlay to your existing approach
- Create eye-catching reports which leverage momentum charts and graphs to back up your investment ideas to enhance client relations

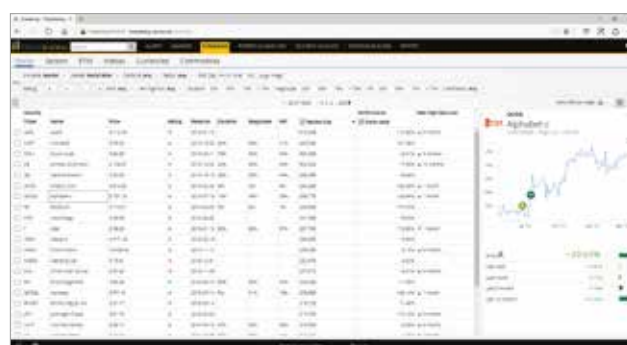
Trendrating for Private Banks

Portfolio Analyzer



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

Screener



Screen for momentum trends on global stocks & ETFs, filtered by over a dozen categories.

Alerts



Log in daily to see momentum changes to securities in your portfolios, baskets, ETFs and indices.

Custom Reports

ABC Wealth Management Equity Portfolio Report - March 31, 2016



Point and click reporting interface enables wealth managers to quickly generate impressive reports on how momentum is impacting each client's investment universe.