

Create Customized Investment Strategies for Clients with World Class Momentum Analytics



Trendrating Solutions for RIAs

According to a recent survey by TD Ameritrade Institutional, RIAs overwhelmingly expect to build on their recent business success, with 79 percent projecting continued growth in assets under management this year. Advisors predict firm assets will increase by 17 percent on average in 2016.

In order for RIAs to deliver objective, meaningful, personalized advice to clients, it is critical that they invest in technology that delivers added performance. This will help firms scale by streamlining investment decision support, and allow more time to strengthen client relationships and differentiate themselves from competitors.

Benefits for RIAs

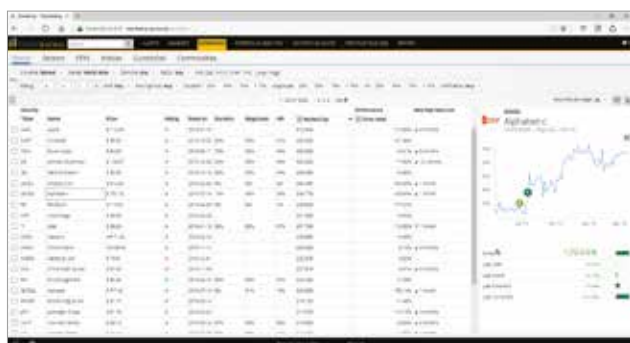
- Actionable ratings on over 15,000 global equities, indices, sectors, ETFs, currencies & commodities across 50 countries
- Momentum historically outperforms other investment factors, with higher risk-adjusted returns (Sharpe ratio)
- Create personalized investment strategies and impress clients with robust statistical validation
- Next generation of Momentum models which reduces the drawbacks of old school methodologies such as Dorsey Wright and Morningstar
- Advise clients using the same ratings data chosen by FTSE Russell for their Momentum Indices

Supported Tasks

- Leverage the Strategy Builder to enable advisors to create alpha and smart beta portfolios
- Create momentum sector rotation portfolios based on country, region, sector and sub-industry
- Screen for momentum on over 1,500 ETFs globally
- Tactically allocate ETF portfolios by strongest momentum
- Use the Excel plug-in to incorporate actionable momentum ratings with existing strategies

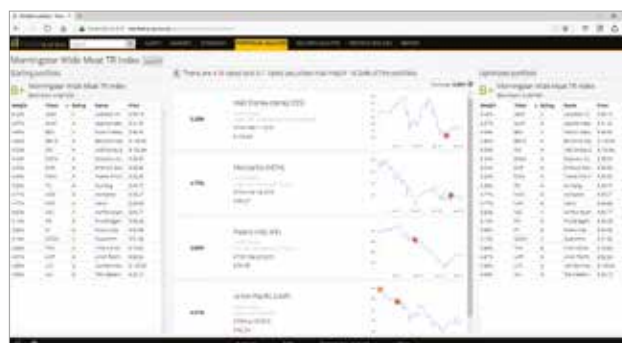
Trendrating for RIAs

Screener



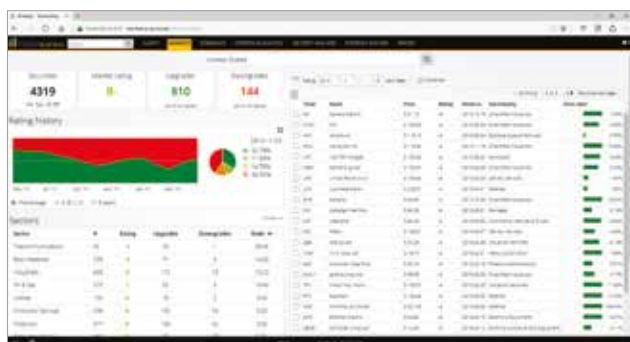
Screen for momentum trends on global stocks & ETFs, filtered by over a dozen categories.

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



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