TRENDRATING
INVESTMENT DISCIPLINE THAT OUTPERFORMS | WEALTH MANAGERS

Exceed Client Expectations with Best in Class Momentum Analytics

Trendrating Solutions for Wealth Managers

**With the rise of Robo Advisors, new combinations of science and human based advisory models have emerged.
Big data and advanced analytics are on the cusp of transforming the WM industry.**

New firms and new business models are driving higher intensity of competition for the same clients and the same assets. A new generation of investors think differently about advice raising expectations for the WM industry. Retail investors are demanding that their advisor has access to the same technology and investment strategies as HNW or institutional investors.

Benefits for Wealth Managers

- Actionable ratings on over 15,000 global equities, indices, sectors, ETFs, currencies & commodities across 50 countries
- Expands valuation metrics with the addition of momentum for best practice
- Provides an objective means of measuring trends that eliminates the “Disposition Effect”
- Offers sound investment ideas for clients based on statistically validated ratings data
- Advise clients using the same ratings data chosen by FTSE Russell for their Momentum Indices

Supported Tasks

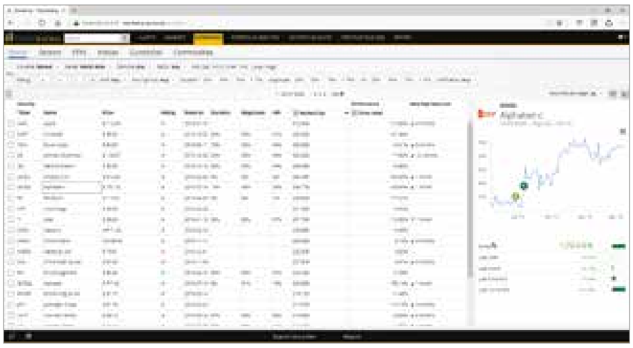
- Run health checks across an unlimited number of portfolios and check daily alerts page to keep clients in the best performing investments
- Screen for momentum on over 1,500 ETFs globally
- Construct portfolios of ETFs with tactical allocations based on country, asset class, sector and strategy
- Create eye-catching reports which leverage momentum charts and graphs to back up your investment ideas to enhance marketing and client communications

Trendrating for Wealth Managers

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

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

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