



Trendrating
Strategy Management Solution



Finally, a system that enables active portfolio managers and advisors to test and optimize their investment strategies and model portfolios. A mission-critical, complex task made easy and fast.

Trendrating’s mission is to help professional investors to get better results from their hard work. Our sophisticated technology and data arms active managers with tools to easily beat benchmarks by expanding their market intelligence in an increasingly complicated market.

The **STRATEGY MANAGEMENT SOLUTION** from Trendrating helps asset managers and wealth managers to design, analyze, improve, document and market customized investment strategies that are the foundation of their mandate. Our customers can select and combine metrics and factors from a rich list of fundamental data and alternative analytics to gain insights about the expected returns across market cycles and improve their performance.

A Simple Three Step Process:

1. Select the fundamental rules that mirror your current investment strategy. Choose the investment universe of interest and test the strategy for up to 10 years. Examine the performance and the key quality metrics to gain insights about the strategy behavior across months, quarters and years and make your own assessment. For example, discover that a Large Cap EU simple value strategy, based on the selection of stocks with a P/E lower than 25 produced a 10-year annual return of 2.31%, underperforming the index by 1.25%.
2. Optimize the strategy either by changing some parameters or by adding other fundamental-driven rules. Test again and discover ways to improve the risk/return profile of your starting strategy. For example, find that by simply adding a filter of price/sales to the same strategy the 10-year annual return grows to 5.29%, beating the benchmark by 1.74%.
3. Take it a step further and add Trendrating’s advanced analytics to add a quality filter to profit from an optimal “trend allocation” that selects stocks in a Bull trend vs. securities in a Bear phase. You can discover that extra alpha can be generated via a “trend quality” validation of the previously selected picks.

universe : 600 large cap Europe	rule 1	rule 2	rule 3	rule 4	annual performance 10 years		
					strategy	STOXX 600	difference
starting value strategy	P/E below 25	largest market cap	na	na	2.31	3.95	-1.64
optimized value strategy	P/E below 25	largest market cap	P/S bottom 20%	na	5.29	3.95	1.34
enhanced value strategy	P/E below 25	largest market cap	P/S bottom 20%	A and B rated stocks	8.38	3.95	4.43

Design and save as many strategies as you like for different geographic regions, countries, sectors or industries, track the performance in real time and execute when ready.

Access a rich selection of data, build your own “recipe”, and boost your performance.

MARKET CAP**VALUE METRICS****GROWTH METRICS****TREND METRICS**

Benefits are measurable:

- Improved performance that in some cases makes the difference between underperforming and beating a benchmark.
- Enhanced risk control.
- Easy customization of strategies across different markets to capture specific price behavior differences.
- Best practice for compliance via full transparency of the governing investment rules.
- Time saving.
- Full scalability.
- Opportunity to support marketing and launching of new products.
- No conflict with the existing process, as the user is in control of the rules selection.



Discover how to benefit from our solutions and join hundreds of our premier clients.

Contact us at info@trendrating.net or visit www.trendrating.com to discover more.

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