



USE CASES	RISK CONTROL ON HOLDINGS	RISK CONTROL AT MARKET AND SECTOR LEVEL	VALIDATION OF NEW INVESTMENT IDEAS	SEARCH OF INVESTMENT OPPORTUNITIES	PROFITS PROTECTION	SECTOR ROTATION	TACTICAL ALLOCATION
WM - managed accounts	sell when downgraded at C/D	monitor downgrades across markets and sectors to reduce exposure in C/D rated universes	look for confirmation at trend level via an A/B rating	select A rated stocks and use Smart Momentum and Retracement to rank and pick the best	use the Retracement to reduce the exposure	use rating levels to switch from weak sectors into the strong ones.	overweight stocks A/B rated
WM - advisory	suggest a switch. Exit C/D rated stocks to buy A rated securities	advise about reallocation in synch with trend rating	select from the recommended list only the stocks with positive rating. Add Smart Momentum to further refine	build a list of new ideas with best rating and Smart Momentum	use the Retracement to reduce the exposure	use rating levels to switch from weak sectors into the strong ones.	overweight stocks A/B rated
AM	keep the portfolio percentage exposure to C/D rated stocks low	minimise exposure to negatively rated markets and sectors and maximise the weight into A/B rated universes	execute a sanity check to new ideas and recommended stocks	start from your relevant investment universe and select A rated stocks and use Smart Momentum and Retracement to rank and pick the best	use the Retracement to reduce the exposure	use rating levels to switch from weak sectors into the strong ones.	overweight stocks A/B rated
FUNDS MANAGEMENT	in case of downgrade to C/D reconsider the investment case	use rating levels for effective tactical allocation	execute a sanity check to new ideas and recommended stocks	start from your relevant investment universe and select A rated stocks and use Smart Momentum and Retracement to rank and pick the best	use the Retracement to reduce the exposure	use rating levels to switch from weak sectors into the strong ones.	overweight stocks A/B rated
SELL SIDE	alert the customer in case of trend downgrades and propose alternative ideas	provide macro ideas to clients	execute a sanity check to new ideas and recommended stocks	build a list of new ideas with best rating and Smart Momentum			