



Trendrating
Performance Management Platform



TRENDRATING – DELIVERING ALPHA.

MEASURABLE, ACTIONABLE, REPEATABLE.

**PERFORMANCE MANAGEMENT SYSTEM
THAT ADD AN EDGE TO YOUR INVESTMENT STRATEGY.**

Portfolio Management is becoming more complex and challenging. Delivering superior return on a consistent basis requires the adoption of advanced analytics and state of art technology. Price trends are impacted by a variety of factors that go beyond the purely fundamental metrics.

Make Trends Work for You

The ability to capture trends, profiting from bull markets and avoiding bear phases is the key to superior performance on a consistent basis. Investors that have a good understanding and a disciplined respect for the specific price trend of securities outperform competitors. **Any investment strategy can be enhanced by a better synchronization to trends developments.**

Most investors use numerous metrics based on fundamental and quantitative data, but very few measure in a proven, objective, systematic way, the real direction of price trends and remain hostage to market noise and opinions, despite the fact that **capturing trends is the key to better returns.**

Trendrating filling a critical gap

The Trendrating system enables active fund managers to improve the performance and control risks. Trends are there all the time, equity markets display an incredible dispersion of performance as showed in the below tables. This is a fantastic opportunity for investors, to capture a large part of the top performers and avoid a large part of the bottom performers using Trendrating. This allows active managers to outperform passive benchmarks that are just a mathematical combination of both winners and losers.

The dispersion of performance

STOXX Europe 600 Performance*		S&P 500 Performance*	
Index	-6.45%	Index	+16.39%
Top 25%	+48%	Top 25%	+47%
Middle 50%	-4%	Middle 50%	+1%
Bottom 25%	-37%	Bottom 25%	-35%

*12 months ending September 1st, 2020

Trendrating' unique & innovative trend capture methodology provides investment managers a framework for outperforming their benchmarks and to prove that active management can be smarter than benchmark tracking passive strategies.

Trendrating Edge

Trendrating provides advanced analytics designed to capture trends, identifying most of the winners and avoiding a large part of the losers with in a yearly horizon. Our model offers a unique rating of trends where **A** and **B** indicate a bull trend and **C** and **D** mark bear moves. **We provide a unique edge where A and B rated stocks on average outperform those rated C and D.**

The solution is a powerful complement to the existing analytical process of active equity portfolio managers.

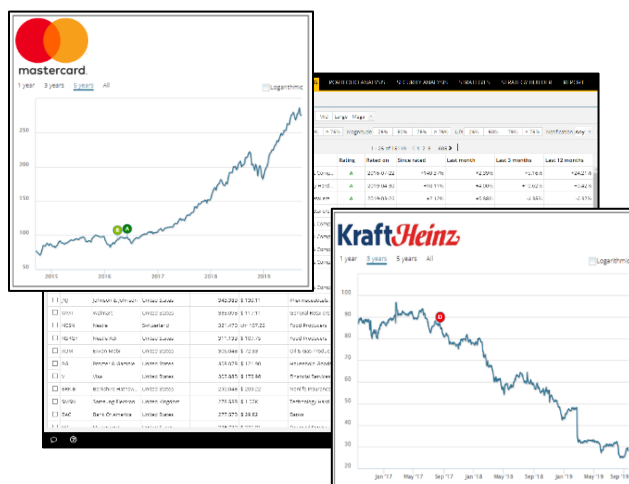
Benefits

- ✓ IMPROVED PERFORMANCE
- ✓ BETTER RISK CONTROL
- ✓ INCREASED TRANSPARENCY AND EFFICIENCY
- ✓ ENHANCED COMPLIANCE
- ✓ TIME SAVING
- ✓ COST REDUCTION



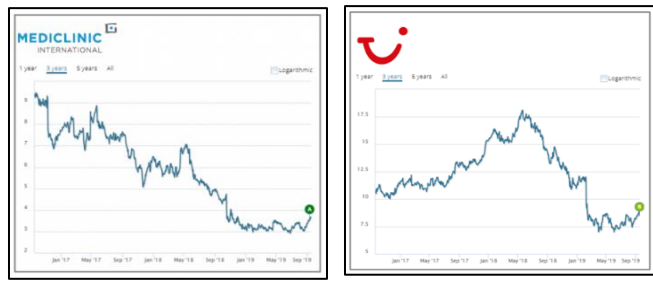
Validating Investment Ideas and analysts Opinion

- Double check the direction and the quality of the trend to validate new ideas.
- Rank your investment universe with an extra layer of intelligence.
- Focus on stocks that check all the boxes.



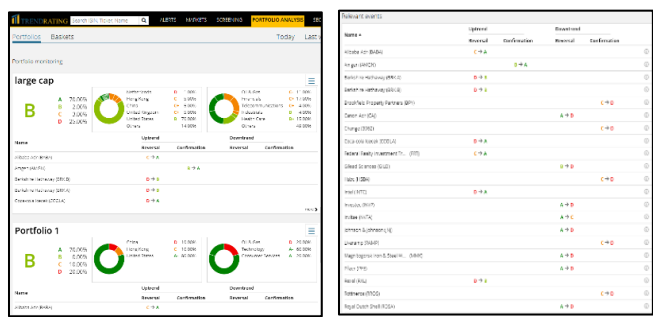
Identify New Investment Opportunities Across Markets and Sectors

- Easily spot new emerging trends to identify opportunities that can also satisfy your investment criteria.
- Expand your universe and capture more potential winners.



Portfolio Monitoring

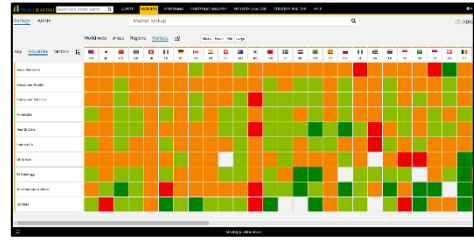
- Run a disciplined and effective 'reality check' for all the portfolios you manage.
- Quickly identify emerging risks across the holdings as a result of trend reversals.



Portfolio Optimization

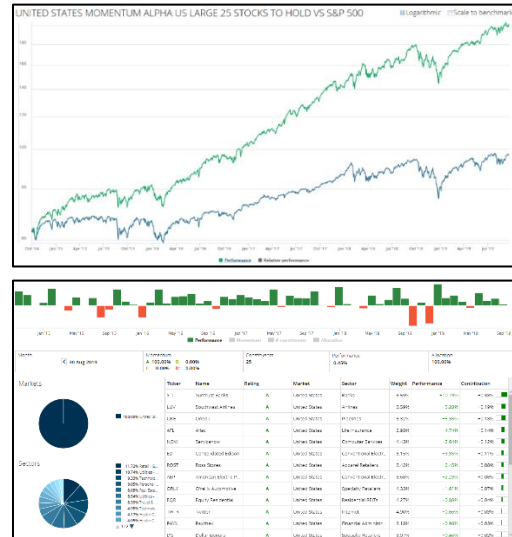
- Analyze your portfolio and adjust the exposure to improve the overall 'trend rating' to maximize returns.
- Identify the weak spots across markets and sectors.

Market	US	UK	CA	FR	DE	JP	HK
Basic Materials	D	D	A	A	A	A	A
Consumer Goods			A	A	A	A	A
Consumer Services			A	A	A	A	A
Financials	C	B	A	A	A	A	A
Health Care			A	A	A	A	A
Industrials	A	A	A	A	A	A	A
Oil & Gas			A	A	A	A	A



Investment Strategy Design and Tests

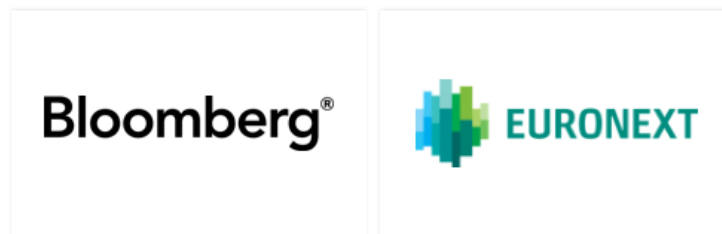
- Use Trendrating as an overlay to your investment strategy to maximize the exposure to bull trends and reduce the risks associated to bear phases.
- Create your strategy, test it, track it in real time and implement.



About Trendrating

Trendrating is a leading provider of advanced analytics and technology for the asset management and wealth management industry. The company mission is to generate measurable results in terms of investments returns and risk control.

We serve more than **100** institutional customers globally, which use **Trendrating** as part of their investment decision process in **Asset management, Wealth Management, Private Banking, Advisory & Hedge Funds** to maximize returns and control risks. Our key strategic partners include **Bloomberg** and **Euronext**.



Discover how you can also benefit from our Solutions, and join our **100+** premier clients.

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