



**Investment Discipline That Outperforms**



**TRENDRATING – DELIVERING ALPHA.**

**MEASURABLE, ACTIONABLE, REPEATABLE.**

**ALTERNATIVE DATA, ADVANCED ANALYTICS AND SMART TECHNOLOGY  
TO IMPROVE ACTIVE MANAGERS PERFORMANCE**

Portfolio Management is becoming more complex and challenging. Delivering superior returns for active managers and stock selectors on a consistent basis requires the adoption of advanced analytics and state of the 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 those that don't.

**Any investment strategy can be enhanced by a better synchronization to trend development.**

Most investors use numerous metrics based on fundamental and quantitative data, but very few measure in a proven, objective and 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 1<sup>st</sup>, 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.



## About Trendrating

The company founders have 25 years of experience in building models and software for asset and wealth managers, and a successful track record of providing innovative, world class solutions. The core team includes a seasoned group of passionate developers, mathematicians, and quants.

We serve professional investors that strive for constant improvement, aim at delivering superior value, who understand the importance of not missing opportunities offered by new data and advanced technology and are in tune with an evolving world.

## What we offer



ADVANCED ANALYTICS DATA FEED



PERFORMANCE MANAGEMENT  
PLATFORM



SYSTEMATIC MANAGEMENT  
SOLUTION



PORTFOLIO SENTINEL (PLUS)

## Trendrating technology

With the Trendrating Advanced technology you can evaluate the direction and the quality of medium to long-term price trends of **20,000 instruments** covering **stocks, ETFs, indices, sectors, countries, commodities and currencies across 40+ countries**. Trendrating is equally effective at identifying meaningful trends at the macro level, as well as screening from the bottom up to validate or generate new ideas. The Trendrating alternative data is a service delivering analytics on stock market trends.

**Trendrating technology supporting a broad range of tasks:**

- ✓ Validating investment ideas and analysts' opinions.
- ✓ Identifying new investment opportunities across markets and sectors.
- ✓ Trend quality ranking for selection and allocation from selected lists.
- ✓ Tactical allocation across markets, regions and sectors.
- ✓ Risk control on individual holdings & alerts of trend reversals.
- ✓ Birds eye level health check of portfolios via the innovative portfolio rating system based on the exposure to uptrends vs. downtrends in individual holdings.
- ✓ Create bespoke alpha and smart beta strategies using the strategy builder to attract new business.

**Partners & Customers**

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**.

 Bloomberg® EURONEXT FACTSET harvest CFA Institute DIH DATA IN HARMONY CHALICE™  
FINANCIAL NETWORK

**Customer's testimonials:**

*"I've just won the firm's annual nationwide stock picking contest and used Trendrating to do it!"*

**(US wealth manager)**

*"I use it every day, I enter client portfolios and get daily updates on them. I always looked at how a stock is ranked before buying it."*

**(Swiss asset manager)**

*"I have found the service very valuable for using the downgrades to identify sell candidates."*

**(UK fund manager)**

*"We are delighted to announce this partnership with Trendrating and the launch of the Momentum Risk Monitor service. We believe that this data will be invaluable in helping asset managers to better manage the risk exposure of their portfolios."*

**(Michael Hodgson, Head of Market Data at Euronext)**

*"Institutional investors who integrate trend capture analytics into their decision process can benefit from more accurate trend assessments."*

**(Tom Myers, Founder & Principal at DIH)**

*"We are pleased to add yet another incredible technology enhanced offering to the Chalice marketplace and provide significant value to our members with the addition of Trendrating."*

**(Keith Gregg, Founder & CEO at Chalice Network)**

**A Few Select Names:**



### Awards

- ✓ **'Most Innovative Technology Provider'**  
HFM Awards – 2014
- ✓ **'Best Research & Data Provider'**  
HFM Awards – 2014
- ✓ **'Top 10 Portfolio Analytics Solution Providers'**  
Capital Markets CIO outlook – 2019
- ✓ **'10 Most Inspiring CEOs to Watch in 2020'**  
Industry Tech Outlook – 2020
- ✓ **'30 Most Influential Companies'**  
CIO Bulletin - 2020
- ✓ **'Top 10 FinTech Solution Providers'**  
Industry Tech Outlook - 2020
- ✓ **'10 Best Innovative Leaders of the year'**  
DigiTech Insight - 2020



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

Contact us at [info@trendrating.net](mailto:info@trendrating.net) or visit [www.trendrating.com](http://www.trendrating.com) to discover more.

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