

Value Added Services

Market Model

Step 1.

This is designed for top end of the IFA and Financial Planner market.

You may design a number of marked models like:

Low Risk

20 % Unit Trust/Mutual Funds
30 % Property
50 % Cash (deposit)

Medium Risk

40 % Unit Trust/Mutual Funds
30 % Property
30 % Cash (deposit)

High Risk

60 % Unit Trust/Mutual Funds
20 % Property
20 % Capital Protected

Within each asset class you may drill down to each individual instrument.

Step 2.

Next step is to use the technology to calculate for each client if they are balanced according to selected Market Model, and print a "deviation report". (Rebalancing report)

You will easily see if your client is over or underweighted in any asset class or instrument. You may test each client versus a one or more market models.

The next step is to automatically rebalance clients portfolio.

