

## 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.

