



PRODUCT OVERVIEW

Portfolio Analytics

kwanti

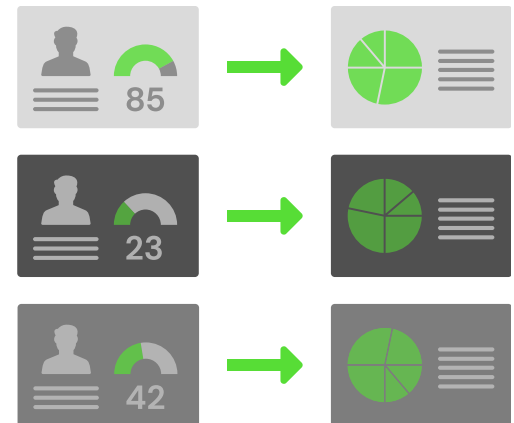
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Building trust & confidence for client success

Client Acquisition and Retention

In a competitive landscape, your first interaction with a prospect should set you apart. Kwanti turns conversations into opportunities by seamlessly diagnosing a prospect's current portfolio. Through personalized risk assessments and visually engaging proposals, you're not just advising—you're telling a story that resonates with their financial goals. Kwanti's tools make it easy to build trust, helping you convert prospects into long-term clients with confidence.

- ▶ PDF Statement Extraction
- ▶ Customizable Risk Questionnaire
- ▶ Portfolio Diagnosis and Recommendations
- ▶ PDF Proposal including IPS



Award Winning Portfolio Analytics



Go beyond the numbers to uncover what truly drives your clients' investments. Kwanti's advanced analysis provides a 360-degree view of allocation, risk, performance, concentration and more... It's about turning insights into strategies that resonate. When markets shift, Kwanti's stress-testing tools give you the confidence to make decisions aligned with your clients' risk tolerance.

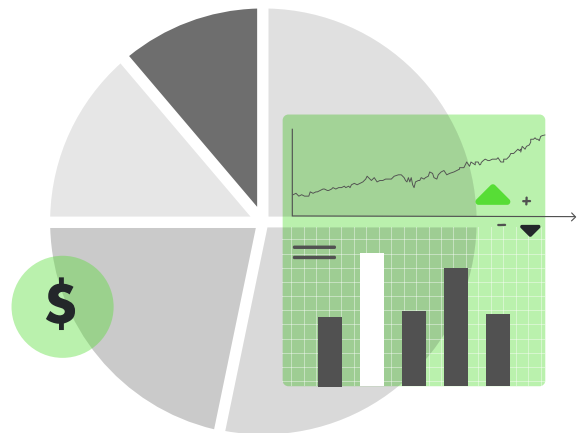
- ▶ Performance Attribution and Metrics
- ▶ Allocation Drilldown and Holdings look through
- ▶ Risk Scores and Stress Tests
- ▶ Expenses, Tax Drag, Yield, Correlations and more

Maximizing efficiency in portfolio management

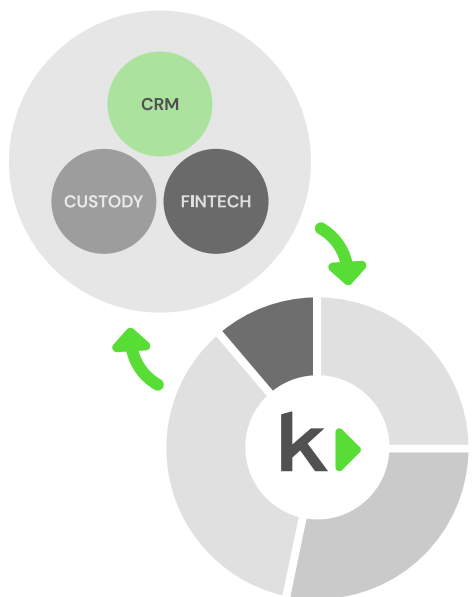
Investment Research and Model Management

Managing portfolios should be effortless, not time-consuming. Kwanti streamlines model portfolio creation, allowing you to focus on delivering value. The intuitive Screener quickly identifies the right securities, while backtesting refines strategies with deep insights. Track model performance over time and blend top-tier investment models from Kwanti's Model Marketplace into tailored solutions—all while lightening your workload.

- ▶ Screener for ETFs, Funds, Stocks and SMAs
- ▶ Detailed Asset Profiles
- ▶ Model Performance Tracking
- ▶ Model Marketplace



Integrations with the Industry's Best



Staying ahead means creating a unified workflow. Kwanti integrates seamlessly with leading WealthTech platforms, linking client accounts and synchronizing data across your advisory ecosystem. This isn't just about reducing errors; it's about building a cohesive tech stack. With automatically updated data, you'll always have the right data at your fingertips to deliver impactful advice.

- ▶ Performance Reporting (Select Custodians)
- ▶ Integrations with WealthTech tools
- ▶ Household and Account Level Analysis
- ▶ Two-Way Model Sync



Start your **free** trial today.

- ▶ No software to install and maintain
- ▶ Subscription model – no long term contracts
- ▶ Cost efficient

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