



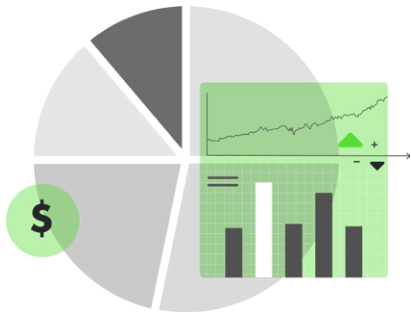
PRODUCT OVERVIEW

Portfolio Analytics

kwanti

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Why Kwanti



FINE-TUNE YOUR ADVICE

Dig deep to get the right answers with just a few clicks. Kwanti puts data behind your expert recommendations to give you confidence in your financial advice.



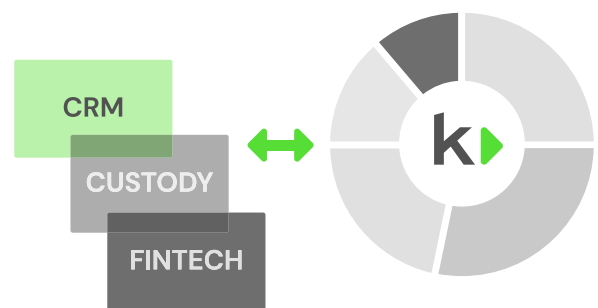
MANAGE YOUR WORKLOAD

Build models as unique as you or leverage the world's best money managers. Easily share your models with your team.



CONVINCE AND CONVERT

Keep the clients you have and get more of the ones you want. Create custom proposals that clearly visualize the value you offer to win over any prospect.



POWER UP YOUR FIRM

Connect Kwanti to your favorite WealthTech applications. Continue your workflows seamlessly and share data to reduce the risk of manual errors.

Portfolio Analytics

Models
Client & Prospects

Allocation
Risk Performance
Optimization
Custom proposals

Custodians
Integrations

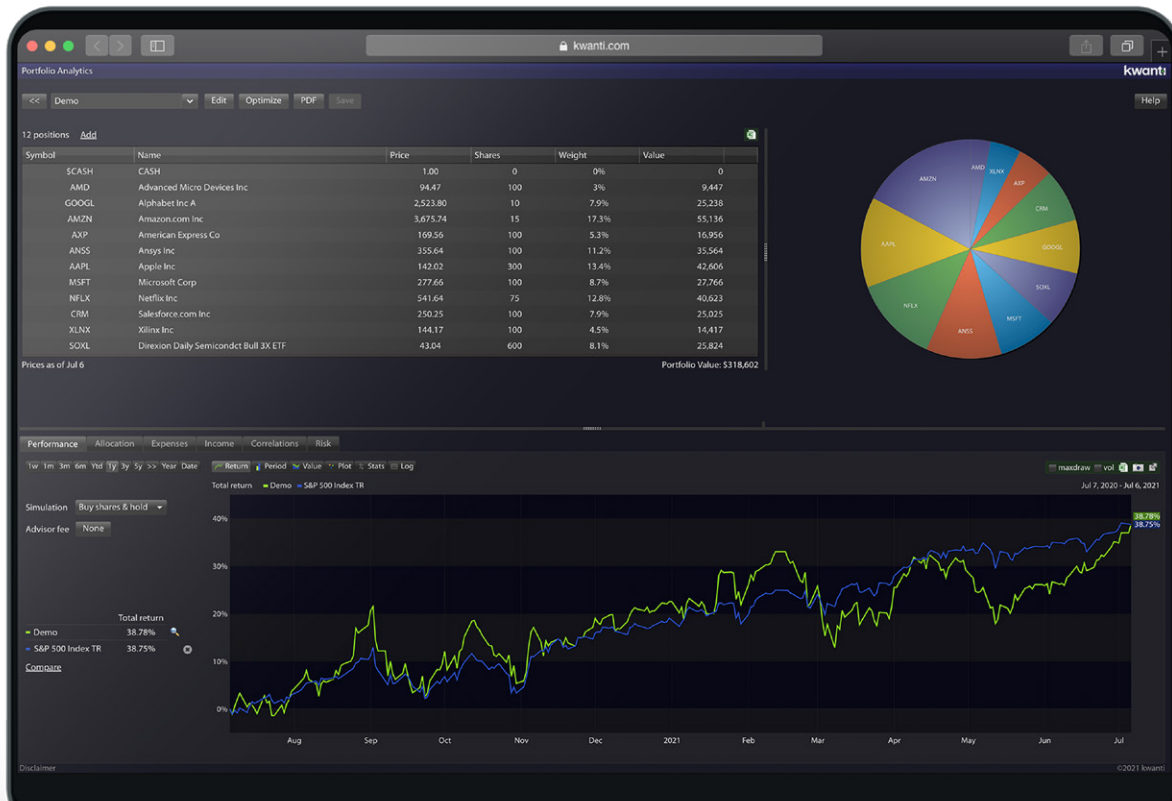


INSTITUTIONAL CALIBER ANALYTICS

- ▶ Detailed asset class, sector, region exposures
- ▶ Backtest models, including advisory fees
- ▶ Build blended benchmarks
- ▶ Evaluate multiple rebalancing strategies
- ▶ Analyze portfolio yield
- ▶ Locate and decompose sources of risk
- ▶ Import accounts from leading custodians and software platforms

DESIGNED FOR CLIENT ACQUISITION

- ▶ Diagnose prospect portfolios
- ▶ Model advisor recommendations
- ▶ Easily create beautiful and elegant proposals to close business



Start your **free** trial today.

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

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