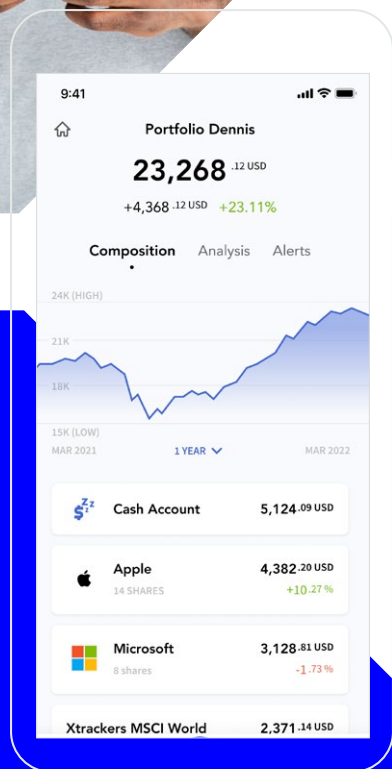


_SELF INVESTOR

**A white-label
execution-only
platform for
easy investing.**



The digital platform self-investors have been waiting for.

Roughly one in five retail investors is deemed to be 'self-directed'. Not only do they want more control over their investments - conducting their own research and making their own investment decisions - but they want to become better investors. As such, they seek inspiration and education to help them build better portfolios.

Novice and seasoned investors alike often lack a robust yet intuitive online investment platform, wherein they can develop investing skills and build a well-balanced portfolio around their own strategy and personality. A jargon-free platform that guides novice investors through the early days and grows with them as they become more experienced.

What if these investors could access this need through the financial company they already know and trust?

WITH SELF INVESTOR, FINANCIAL INSTITUTIONS CAN OFFER THEIR CLIENTS A ROBUST AND STATE-OF-THE-ART SOLUTION THAT COMES WITH MANY BENEFITS:

FAST GO-TO-MARKET

Enhance your digital offering and significantly reduce time-to-market compared to building a proprietary solution from scratch.

LOW MARKET ENTRY FEE

Replace a large one-off capital expense with an operating expense, freeing up capital.

WIN CLIENTS

Retain clients with a low-entry solution. Win back clients that sought online execution elsewhere. Gain new clients with an attractive, appealing platform.

INCREASE REVENUE

Activate sleeping savings and earn additional revenue by generating transaction (or other) fees.

HIGHLY CONFIGURABLE SOLUTION

- Intuitive design that is built to match your brand and values.
- Tailored to fit the specific requirements of your customer base.
- Look & feel matches your visual identity.
- Highly configurable.
- Decide which markets and products customers can access.
- Decide which modules and features you incorporate.

THREE WAYS TO INTEGRATE



Stand-alone app

Recommended when Self Investor is used as a client acquisition tool.



App-in-app

Our app can be accessed within an existing app.



Web application

Deeplinks in your existing platform will automatically open the Self Investor app.

FROM COMPACT TO SIGNATURE

Compact

- Standard version with basic functionalities
- A straightforward online investment platform at low cost

Plus

- Executive version with broad functionalities
- Full-service solution that supports the investor with rich information and extra guidance

Signature

- Premium flagship version with full functionality
- High-end solution for investors who want the very best
- Integrate custom features and design

TARGETED RETAIL END CUSTOMERS

Invest for me
Discretionary

Help me invest
Advice



Invest myself
Execution-only



Starting
investors



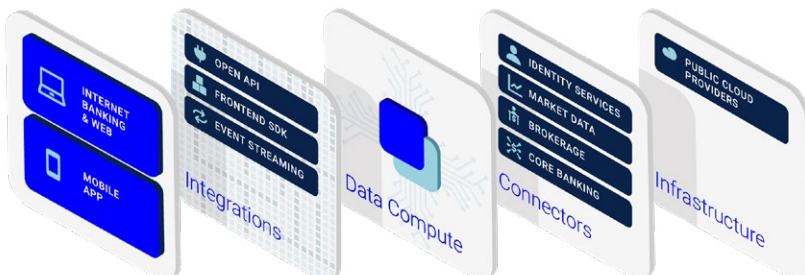
Experienced
investors



Day
traders

EASY-TO-INTEGRATE AND RELIABLE

- Broker and data provider agnostic.
- Mature API stack that easily connects our services to your environment.
- Different levels of integration: from stand-alone app with a separate infrastructure to complete integration in your environment, and everything in between, depending on your needs.
- Developer-friendly: unified API that is future-proof and well-documented.
- Short time-to-market.
- 24/7 technical support and incident management.
- Certified partnerships with industry-leading IT vendors and integrators like Intel, Microsoft, Oracle and Amazon.
- Standards-based integration patterns for reliable user authentication (oAuth) and enterprise integration (event-driven architecture).
- Cloud-native solution that relies on the scalability, security and quality-of-service of the major Cloud providers.
- Secure by design: security is built into the system at every layer, as recurrently audited and validated by 3rd parties.



Designed to inspire, empower and engage.

INSPIRE

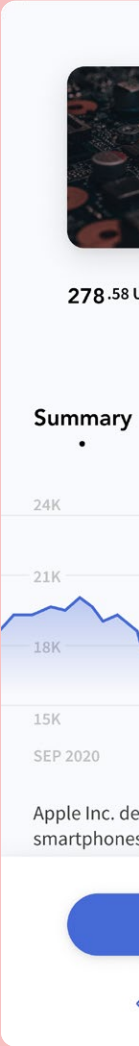
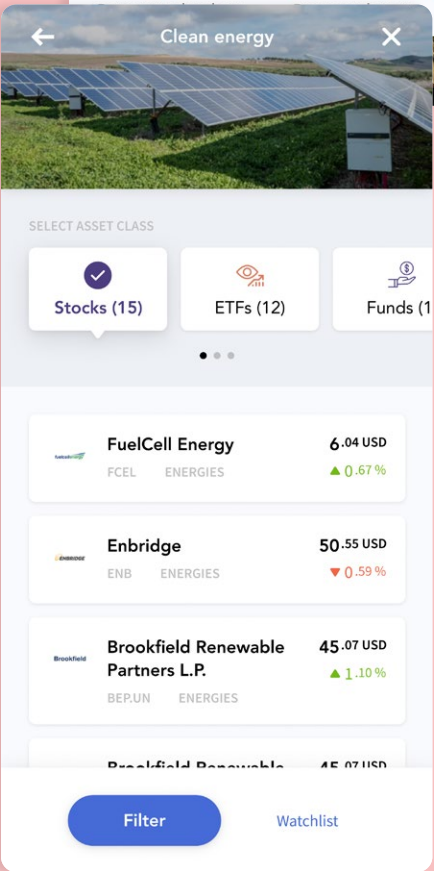
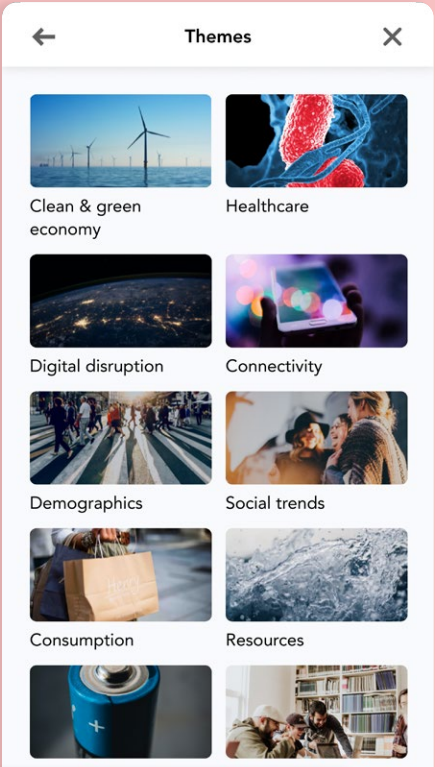
Investors can access current investment themes, sample portfolios and strategies, and use snackable content and edutainment to prompt investment ideas.

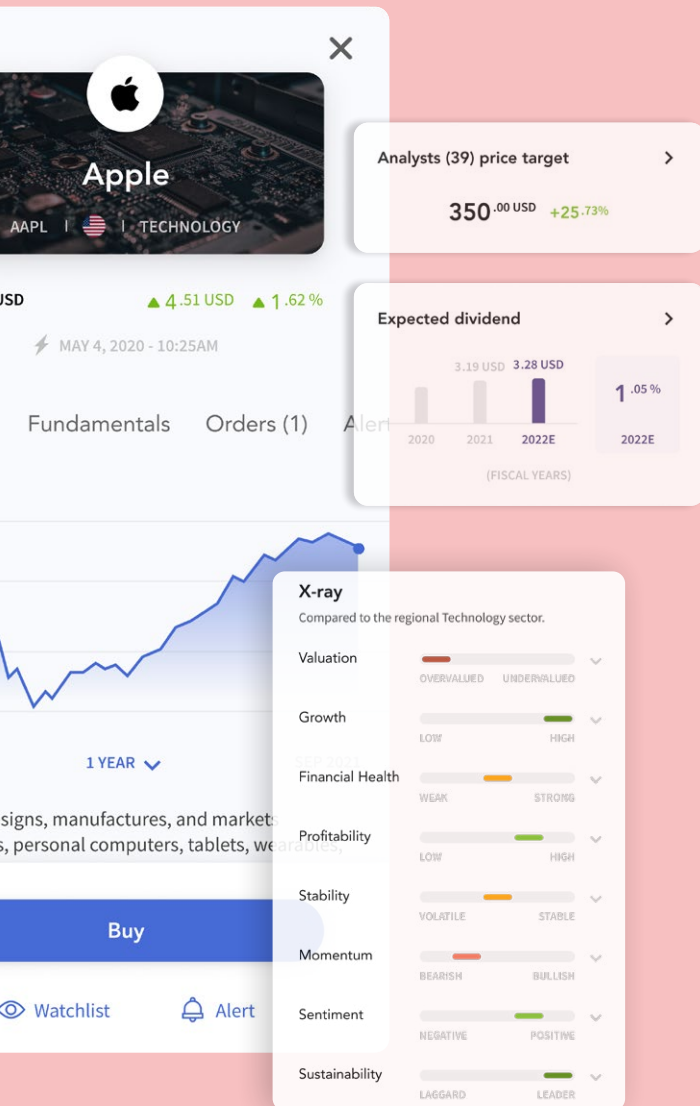
EMPOWER

Irrespective of experience, investors can plug into detailed analyst recommendations, ratings, watchlists and alerts, plus fundamental and technical analysis.

ENGAGE

The use of 'social layers' allows investors to discover popular strategies, access the most traded stocks, and employ peer benchmarking to keep them engaged.





ONBOARD & ENGAGE

Intro for starting investors

MiFID-questionnaire

Edutainment

Intuitive guidance

INSPIRE & EMPOWER

Thematic idea center

Sample portfolios & strategies

Fundamental & technical analysis

Watch list & alerts

Portfolio presentation
couneters disposition
effect

CUSTOMISED REPORTING

Cash balances

Portfolio positions,
gains & losses

Orderbook

Cash & securities history

ESG APPROACH

Built-in ESG approach

Both on stock level
and portfolio level

EDUCATION

Education through
microlearning techniques

Collaboration with
universities

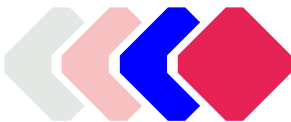
Helps users become
better investors

Stay ahead.

At InvestSuite, we believe a combination of shifting customer expectations, technological evolutions, and the emerging ecosystem of financial institutions, fintechs and core banking platform providers is creating enormous opportunities.

With our suite of white-label solutions, we help financial companies extend their product range with next-generation tools, in an agile, fast and cost-effective way. We are a pure B2B InvestTech company with a team comprised of seasoned experts who operate across AI/machine learning, design, human insights and wealth management.

Our shared goal is to create user experiences that open new markets and drive commercial success for our clients.



Feel free to contact us if you would like to discover our suite of InvestTech solutions.

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