_ STORYTELLER

Highly personalised, insightful, narrative-based portfolio performance reports on demand.

Ⓒ Ⓑ Capatal Bank

Dear Mrs Smith,
we are continuing the upward trend again after our previous dip in performance!

01/10/2022 - 31/12/2022

InvestSuite
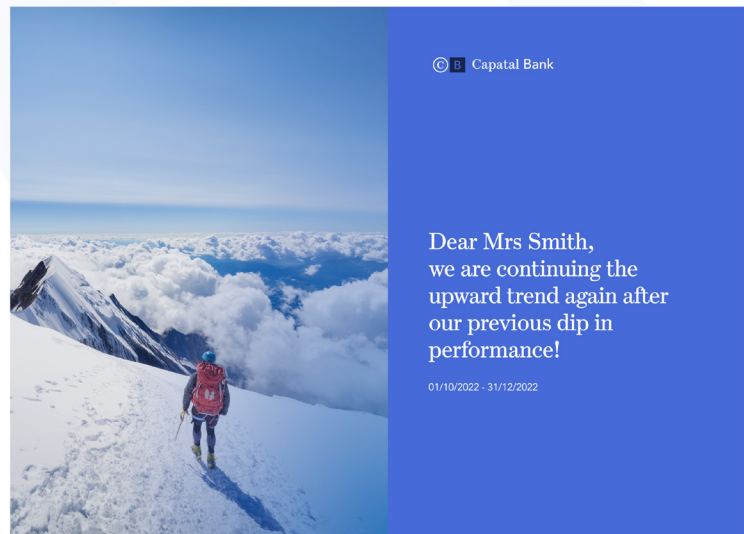
Engage your customers with a story on the how & why of their portfolio's financial and sustainability performance.

StoryTeller is an API-based solution which, based on minimal input data requirements, allows you to automatically generate narrative-based reports that explain the how and why of financial and sustainability performance of your individual investment funds.

StoryTeller is a white-label solution, meaning that its highly modular and configurable character allows us to configure the output to:

- your brand and style guidelines
- your wishes with regard to the type of content, insights, and level of detail
- your language and tone of voice requirements

The long-term view is an important aspect of a long-lasting investment relationship. Insights on return since inception and YTD returns are crucial to put a short-term return into perspective.

StoryTeller can calculate and explain how a portfolio evolved during a period of time and visualise any portfolio characteristics that might be of interest.
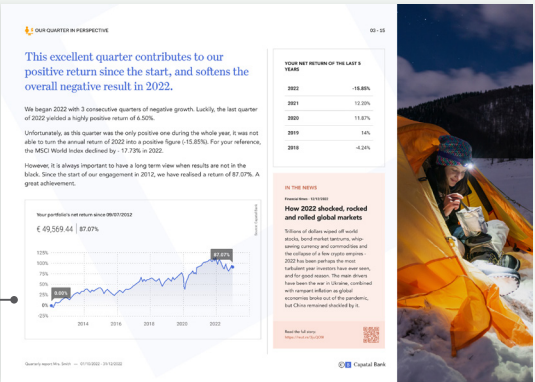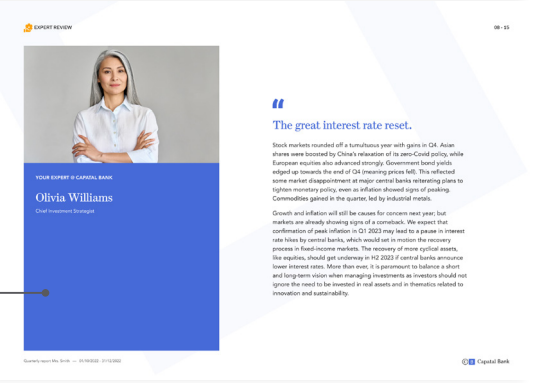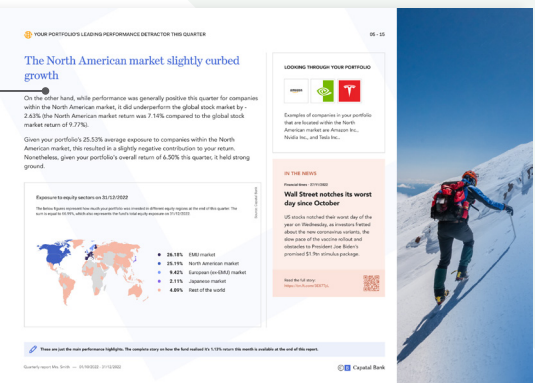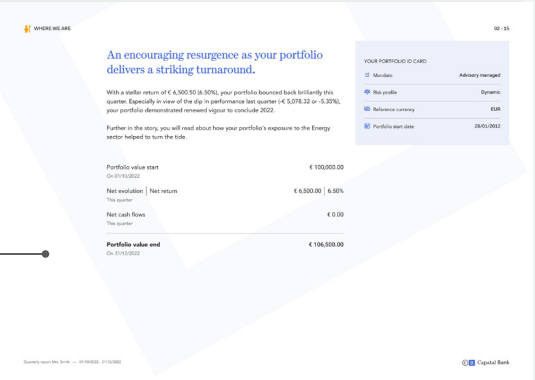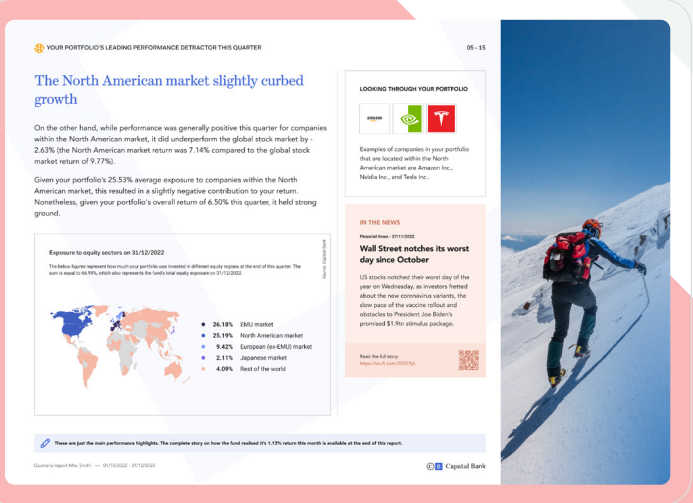
StoryTeller is underpinned by an in-house built performance attribution engine to derive insights on performance contributors and detractors.

StoryTeller has full look-through capabilities.

StoryTeller has a news retrieval engine, trained to retrieve and summarise the most relevant news articles (> 30K global sources) to explain the impact of a given performance factor.

StoryTeller is able to report on exposure to investment themes and, thereby, the fund's contribution to SDGs with relevant and tangible insights.

The contribution to SDGs can be made more tangible with a selected ESG data metric to evaluate the performance of the companies within the fund to those of the benchmark.
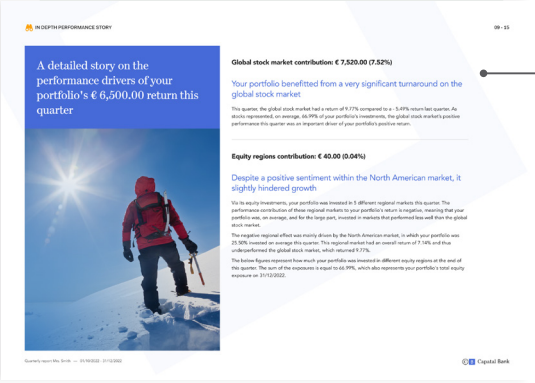
It is also possible to include specific content that is written and provided by you.

A full performance attribution story can be included when a high level of detail is required.

All it takes is a simple API call. StoryTeller takes care of the rest, fully autonomously.

01 Send a request
to the StoryTeller API

The API has minimum input data requirements and allows you to parametrise the requested report.

02 StoryTeller retrieves financial data on the instruments in the fund or portfolio

We have connections to Morningstar and Refinitiv to retrieve financial data on individual instruments (price, composition, classification, ESG…). StoryTeller can also connect to InvestSuite's Custom Data service, to which you can post your custom data more timely and accurately.

03 StoryTeller calculates insights

Via in-house built algorithms, StoryTeller calculates insights on returns, performance attribution, exposures, transactions, SDG contributions, ESG data metrics, news article retrieval and summarisation (AI & ML), performance simulations, risks…

04 StoryTeller creates a data-driven story

Insights are generated as data variables. These variables are used within a large scenario-based text template database to generate a data-driven story. StoryTeller's white-label text database can be validated by your Compliance teams and configured to your tone of voice.

**05** StoryTeller stores the output on your side

The story can be created in both a print-friendly and an app-responsive format to create an interactive experience within your native banking applications.

Drive new levels of engagement, improve transparency and trust, and increase efficiency and consistency along the way.

StoryTeller reports can be generated in a print-friendly PDF, app-responsive or even video format, allowing you to embed and distribute these via your native banking applications to your institutional and/or retail clients.
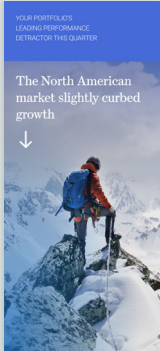
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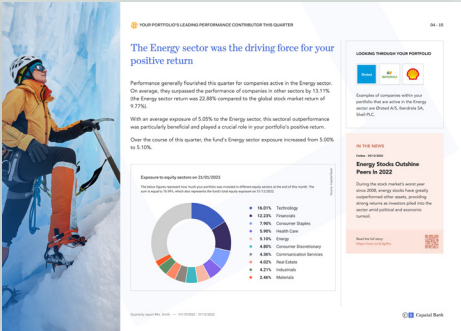
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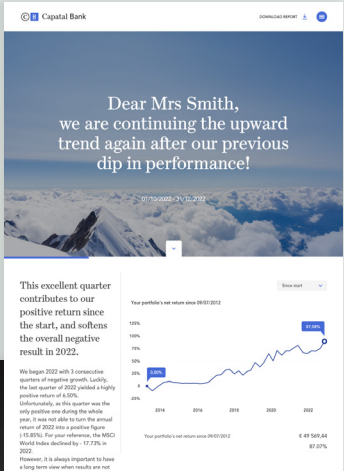
Video

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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