

_INSIGHT APIS

A suite of API-enabled solutions to guide wealth customers in their investment decisions.



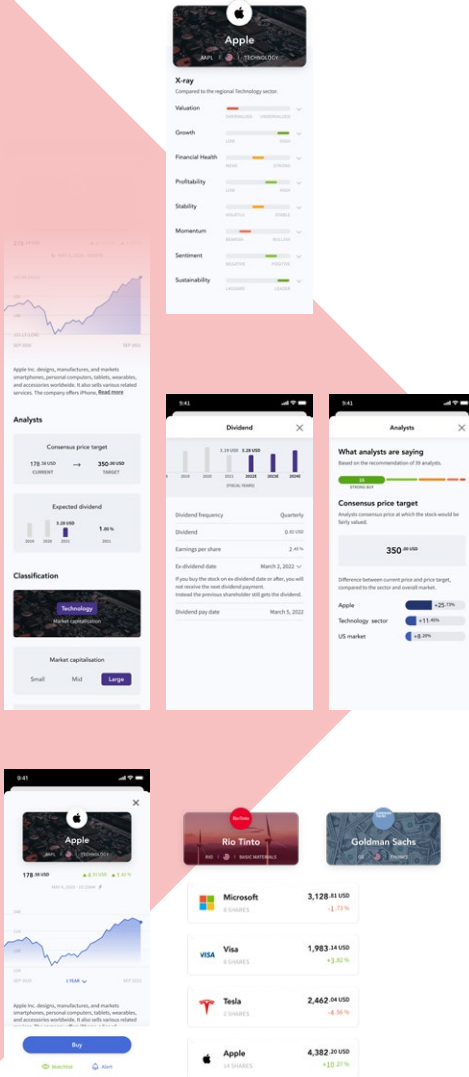
A broad suite of unique insights to embed into your customer experience.

End customers rarely get a rich picture of their investments - they either receive limited information or, alternatively, an overload of data, making it difficult to reflect on their investments or find inspiration to take the next investment decision.

Our goal at InvestSuite is to make managing wealth an engaging and immersive experience. We provide a suite of products designed to augment your platform and deliver moments of delight to your customers.

Insight APIs are API-enabled solutions to guide and inspire wealth customers in their investment decisions and bring portfolio reporting to life in an intuitive, engaging manner.

INSIGHTS ON COMPANIES AND STOCKS



X-Ray - Fundamental data transformed into actionable insights

Our X-Ray API scores stocks on 8 understandable dimensions: valuation, growth, momentum, stability, financial health, profitability, sentiment and ESG. It allows users, even with little financial background, to intuitively grasp key metrics of an instrument.

ID Card - An on-demand snapshot of relevant security data

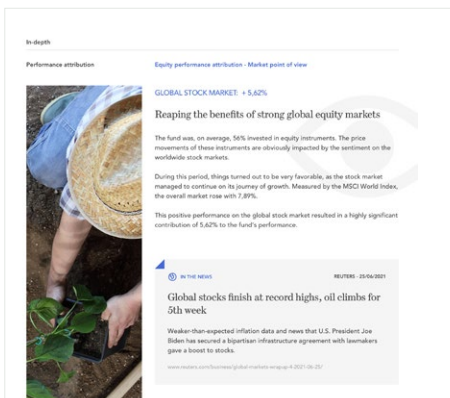
Our ID Card API provides a range of different data points for a security. The information is shown in a comprehensive and intuitive summary. It is available for stocks, ETFs and mutual funds. It can be used to augment information shown to investors and traders. It can be used as an additional visualisation of a company in your application.

Logos - Global brand logos aggregated in one endpoint

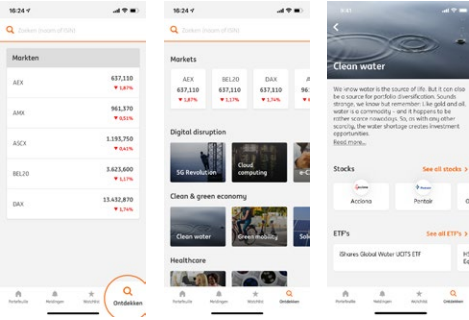
Our Logos API provides access to scalable logos for the 12,000 largest companies in the world.

News - Find the most relevant news sources for any investment concept

Our News API aggregates thousands of news sources to find the most relevant news articles for any investment concept. It determines the sentiment (negative/positive/neutral) and automatically summarises the article using machine learning.

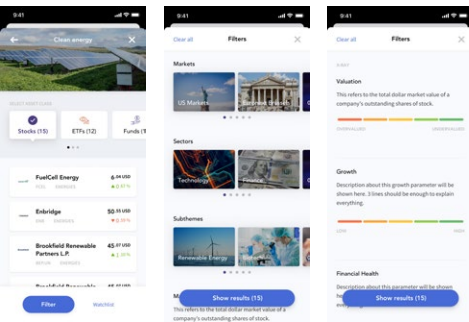


INSIGHTS ON INSTRUMENTS



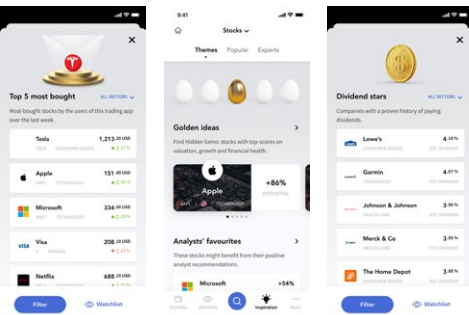
Themes - Curated thematic lists to provide smart grouping of securities

Our Themes API groups and curates relevant stocks, ETFs and funds according to specific investment themes and subthemes, such as 5G revolution and solar technology. It helps to give investors insight into the most powerful themes that are shaping the world.



Smart Search - Search for instruments on a wide range of criteria

Our Smart Search API provides retail investors with a quick search for instruments based on a complex filter covering a wide range of criteria, such as our X-ray factors. It allows investors and traders to define their own dynamic strategies, leading to increased interaction and trading.



Inspiration - Inspire with fresh investment ideas

Our Inspiration API provides inspiration for investors, stimulating new ideas based on curated lists. The suggestions are automated, built upon predefined investment criteria, using our Smart Search API.

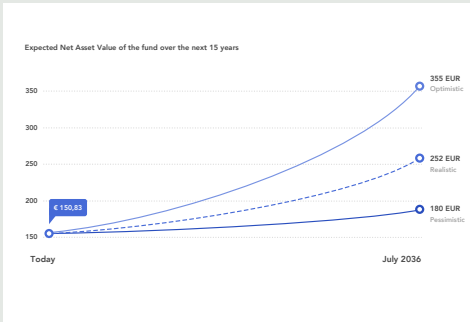
INSIGHTS ON COUNTRIES/ECONOMIES

Economic Dashboard - Indicators that elegantly communicate key economic data

Our Economic Dashboard API is a 'market barometer' that provides insights into a wide range of economic indicators for specific regions: economic activity, employment, inflation, and more. These indicators can even be plotted onto geographic maps.



INSIGHTS ON PORTFOLIOS

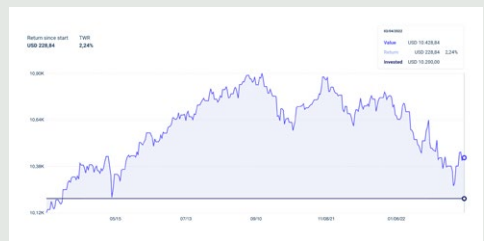


Monte Carlo Simulation - Simulate long-term performance to educate and inspire

Our Monte Carlo API simulates a range of possible future returns for a portfolio, and can incorporate periodic deposits and withdrawals, showing the impact of those transactions. It can also make use of house views on future asset class returns.

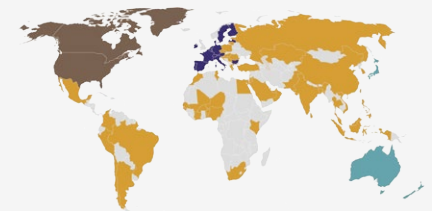
Past Performance & Attribution - Performance calculation and attribution for transparency and engagement

Our Past Performance & Attribution API calculates the historical return of a portfolio and gives an understandable insight into the drivers of the client's portfolio.



AVERAGE REGION EXPOSURE AND CONTRIBUTION

	EUROPE	NORTH-AMERICA	ASIA-PACIFIC	EMERGING
AVG. EXPOSURE	39%	43%	12%	6%
CONTRIBUTION	+ 1,60%	- 0,90%	+ 0,12%	- 0,02%



The companies in your portfolio did very well ecologically

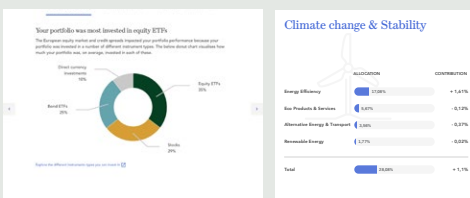
Compared to the companies in the MSCI World Index, the companies in your portfolio emit on average 161 tonnes of CO₂ emissions less than those in the benchmark on a yearly basis, and per million dollar of revenues.

161 tonnes of CO₂ emissions

=

The yearly absorption capacity of 8.050 trees

The average tree is able to absorb around 20 kg of CO₂ emissions of fresh biomass, which means that it absorbs CO₂ and converts this into sugar, 161 tonnes of CO₂ emissions require the absorption capacity of 8.050 trees.



Portfolio & ESG Analytics - Analytics on portfolios and ESG performance

Our Portfolio & ESG Analytics API analyses portfolios and provides a look-through based on sectors, regions and themes. It displays risk analytics and shows ESG analytics translated into relatable insights. It stimulates clients to think about their portfolio and find possible improvements.

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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