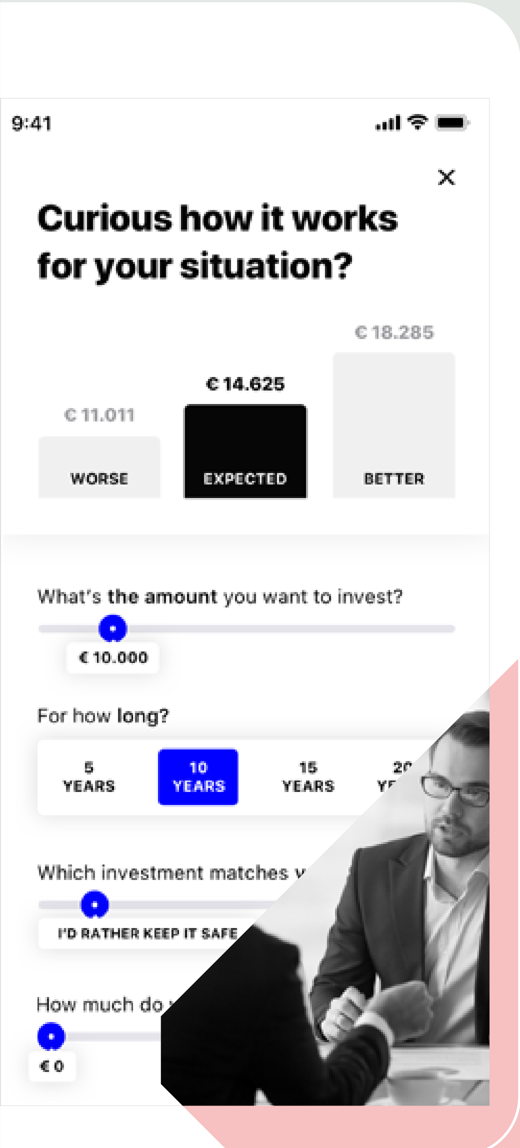


A low-cost, customisable digital wealth management tool that converts dormant savings into profitable investment assets.

_ ROBO ADVISOR

InvestSuite

PARAMETRISE AND CUSTOMISE YOUR ROBOADVISOR

- Intuitive design that is built to match your brand and values.
- Full control over parameters which impact portfolio construction.
- Define and set the end client's personalisation framework.
- Digitise your existing risk profiling process or use InvestSuite's psychometrically validated Mifid-compliant investor profiling module.
- Offer in-house or third-party funds/ predefined model or off-the-shelf customised portfolios.
- Set your own pricing framework.

DIFFERENT WAYS TO IMPLEMENT

Separate app
Launch a brand new application.

Hybrid solution
Onboarding and portfolio construction tool for advisors.

App-in-app
For fast uptake and conversion within your existing banking app.

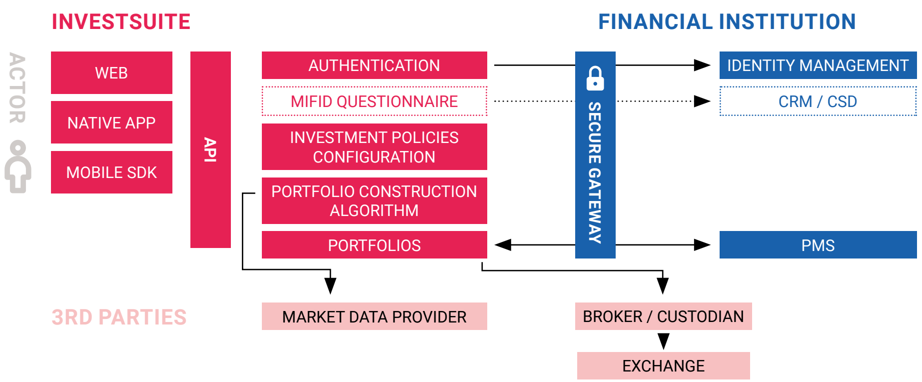
Integrate into existing platform
Enhance your existing home banking platform with a new functionality.

TARGETED RETAIL END CUSTOMERS

Invest for me Discretionary	**Help me invest** Advice	**Invest myself** Execution-only

EASY TO INTEGRATE FRONT TO MIDDLEWARE

- All data and operations are accessible via a REST API that adheres to the OpenAPI 3.0 standard.
- Security comes first when dealing with integration. A validated set of IT policies and procedures impose an active cyber resilience program and a business continuity plan that relates to cyber risk management, which both are followed up by a dedicated Chief Information Security Officer (CISO).
- Dedicated technical support.
- Authenticate your users securely with an OpenID connect compliant identity management system.
- Optionally InvestSuite integrates with the bank's back office pulling data through a security API gateway, or truly hassle-free using a straight connection to top tier core banking providers and PMS systems.



A wealth management service for the masses.

Trillions worth of savings lie dormant in low interest accounts. But with access to so much information, today's consumer understands that unattractive interest rates are probably eroding his wealth. Question is then, why don't they act?

For a start, most are unwilling to pay the typically high fees to have their money managed on their behalf. Plus, many don't have the know-how, or even the desire, to invest money for themselves. There is a big win-win opportunity for institutions and advisers to help convert the savings into investments.

Technology can help financial advisors and institutions —often well positioned to take the bull by the horns thanks to already embedded client relationships — to convert passive savings into more profitable investment assets. The first generation of digital natives are already shaking up the wealth management industry. At this point it's just a question of getting caught out by the shift – or being part of it.

INVESTSUITE ROBOADVISOR IS A STATE-OF-THE-ART DIGITAL END-TO-END WEALTH SOLUTION THAT FINANCIAL ADVISORS AND INSTITUTIONS CAN OFFER TO THEIR NEXT GEN INVESTORS.

InvestSuite Robo Advisor is designed as a 3-module solution.
Our end-to-end front-end flow, proprietary investor profiling module and portfolio construction framework may be implemented separately or in any combination.

MIFID ONBOARDING MODULE

A regulatory compliant client profiling using either an existing risk profiling logic or InvestSuite's internally developed, psychometrically validated solution.

FULLY CUSTOMISABLE FRONT-END

The white label front-end, based on user experience best practices, can be customized to meet own brand values and look & feel. It can be used as a separate application or integrated into an existing website or app.

PORTFOLIO CONSTRUCTION FRAMEWORK

InvestSuite's portfolio construction framework is fully parametrisable and uses the next-generation "iVaR" risk metric that is consistent with what real investors experience as risk.

HYBRID MODULE

Empower advisors with the advisory tool for onboarding, portfolio construction and follow-up of (new) clients.

Launch your own Robo Advisor.

ONBOARD & ACTIVATE

Interactive and engaging customer onboarding.

Science backed and automated MiFID questionnaire.

Free simulation allows customers to test out the application first.

INFORM & REPORT

Clear overview of the portfolio positions, gains & losses.

Performance benchmark.

Transaction history.

Transparent cost reporting.

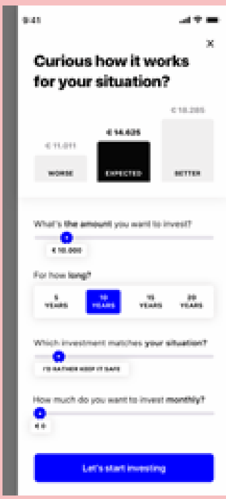
PERSONALISATION (end client level) all within the boundaries set by the financial institution

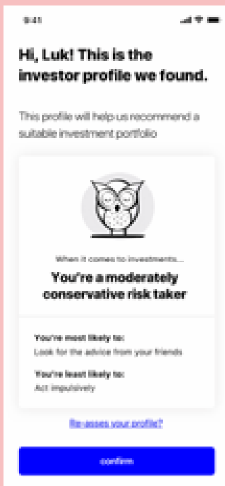
Rebalancing preferences.

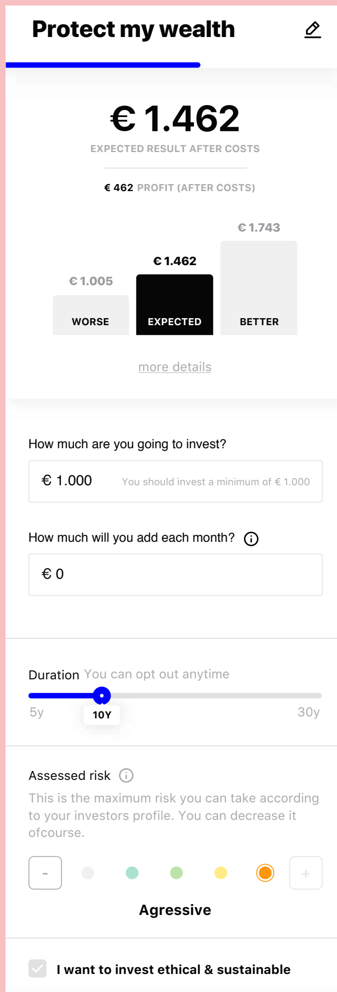
Tilting preferences to sectors, currencies, geographies.

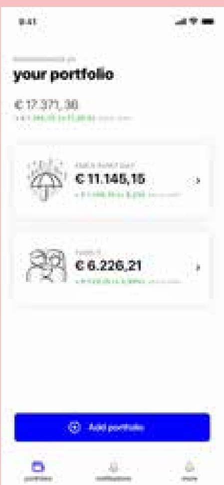
Tilting towards themes like ESG.

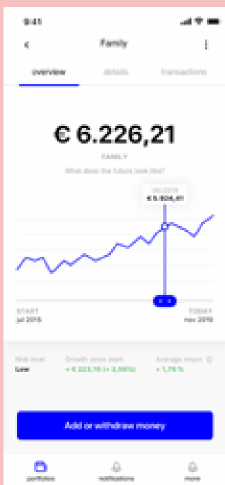
Alerts and settings.

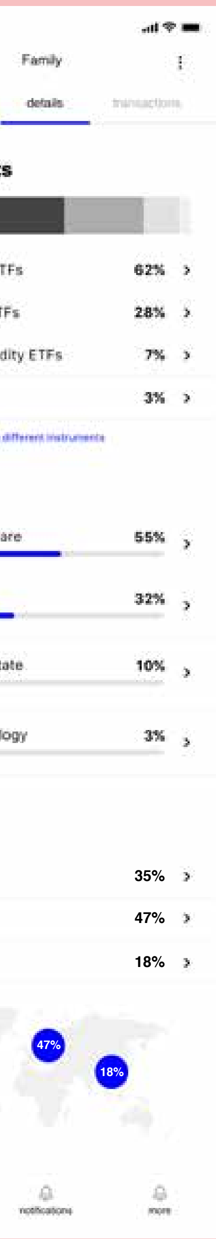




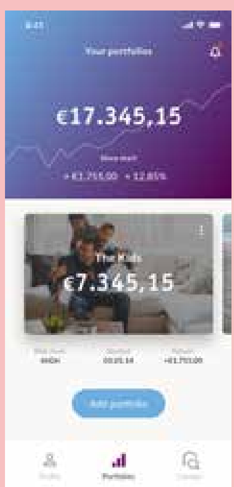


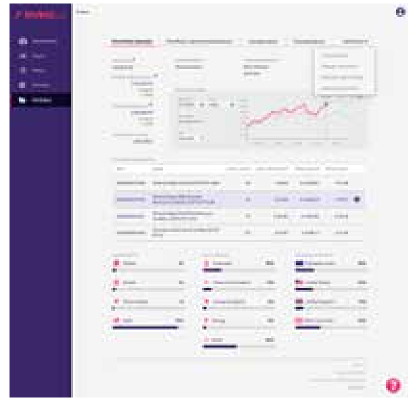






The front-end, fully customisable to your brand, allows end customers to view their portfolios and follow up on their investment performance or change their investment policy.



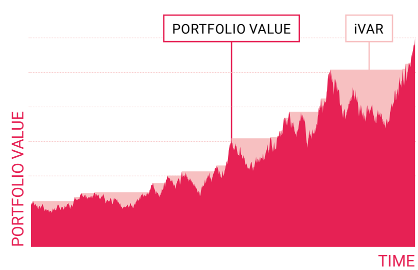


ADMINISTRATION INTERFACE FOR CONFIGURATION

The interface is used to configure all of the different investment policies, either model portfolios or portfolio optimisation settings and constraints. This can be done in a very user-friendly way and also includes an advanced backtesting framework.

There are up to 100 parameters to be set including sectors, transaction costs, tax matters, rebalancing frequencies, currencies, ...

The framework allows the use of thousands of instruments for the portfolio construction like ETFs, mutual funds, stocks and even cryptocurrencies.



STATE-OF-THE-ART ALGORITHMS ADDRESS THE WEAKNESS OF TRADITIONAL RISK MEASURES

- The portfolio construction framework is fully parameterisable, and is based on InvestSuite Value At Risk (iVAR) – a proprietary next-generation risk measurement metric.
- One of the most advanced and comprehensive portfolio optimisation methodologies on the market means consistency with the risk investors actually experience.
- Designed to minimise losses and the time it takes to recoup them, our algorithms address weaknesses in the risk measures (volatility and VaR) used by many other robo advisers.

Let’s talk.

At InvestSuite, we believe the combination of changing customer expectations, technological evolutions and the emerging new ecosystem of financial institutions, fintechs, core banking platform providers and others is creating enormous growth 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 wealthtech company with a team 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 up new markets and drive commercial success for our clients.

Discover our product suite of modular wealthtech solutions

ROBO ADVISOR I SELF INVESTOR I STORYTELLER I PORTFOLIO OPTIMIZER

@investSuite | hello@investsuite.com | www.investsuite.com
+48 601 900 015 Chris Eichhorn | Business Development