A next-generation white-label execution-only platform for easy investing.

_ SELF INVESTOR

InvestSuite

HIGHLY-CUSTOMISABLE SOLUTION

- Intuitive design that is built to match your brand and values.
- Tailored to fit the specific requirements of your customer base.
- Decide which markets and products customers can access.
- Turn different modules and features ON or OFF.

THREE WAYS TO IMPLEMENT

Separate app
Launch a brand-new application

App-in-app
For fast uptake and conversion within 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

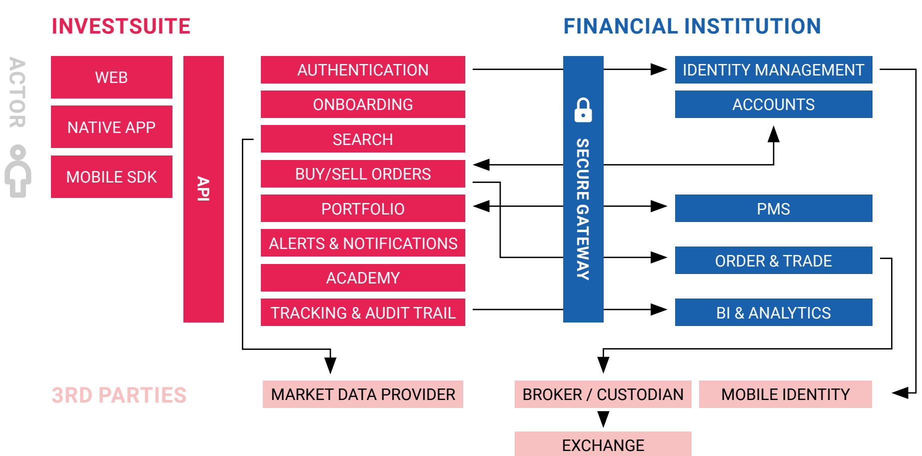
Help me invest
Advice

Invest myself
Execution-only

- ✓ Starting investors
- ✓ Experienced investors
- ✗ Advanced investors

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.
- Integration with a bank's core banking system through a secure API gateway or with a direct connection through the order management system of brokers and custodians. If infrastructure allows, even an STP-connection could be set up.



Give self-directed investors the online tool they have been waiting for.

Around 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.

However, what both novice and seasoned investors often lack is a robust yet intuitive online investment platform; somewhere they can learn how to invest and build a well-balanced portfolio around their own strategy and personality. A platform that not only steers clear of confusing jargon, but which guides them in the early days and grows with them as they become more experienced.

What if these investors could turn to the financial company they already know and trust?

A NEW FRONT TO MIDDLEWARE ONLINE INVESTMENT SOLUTION

With Self Investor, financial institutions can offer their clients a robust and state-of-the-art solution that comes with many benefits:

GO TO MARKET FAST

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

TURN CAPEX TO OPEX

Replace a large one-off capital expense with an operating expense, freeing up capital and improving return-on-assets.

RETAIN CLIENTS

Retain clients with a low-entry solution. Win back clients that went elsewhere for online execution. Gain new clients with a very attractive platform.

INCREASE REVENUE

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

Designed to inspire, empower and engage.

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

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

3. ENGAGE
The use of 'social layers' means investors can discover popular strategies, the most traded stocks, and use peer benchmarking to keep them engaged.

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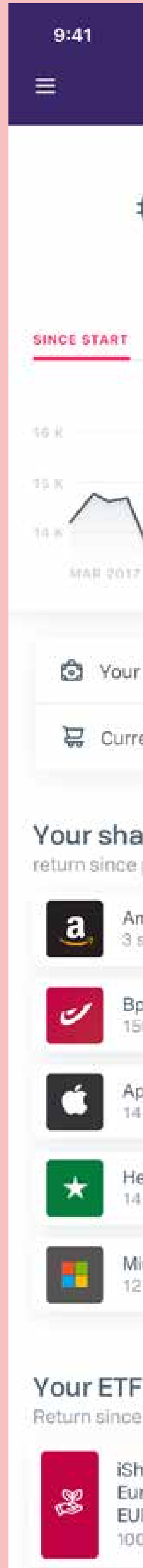

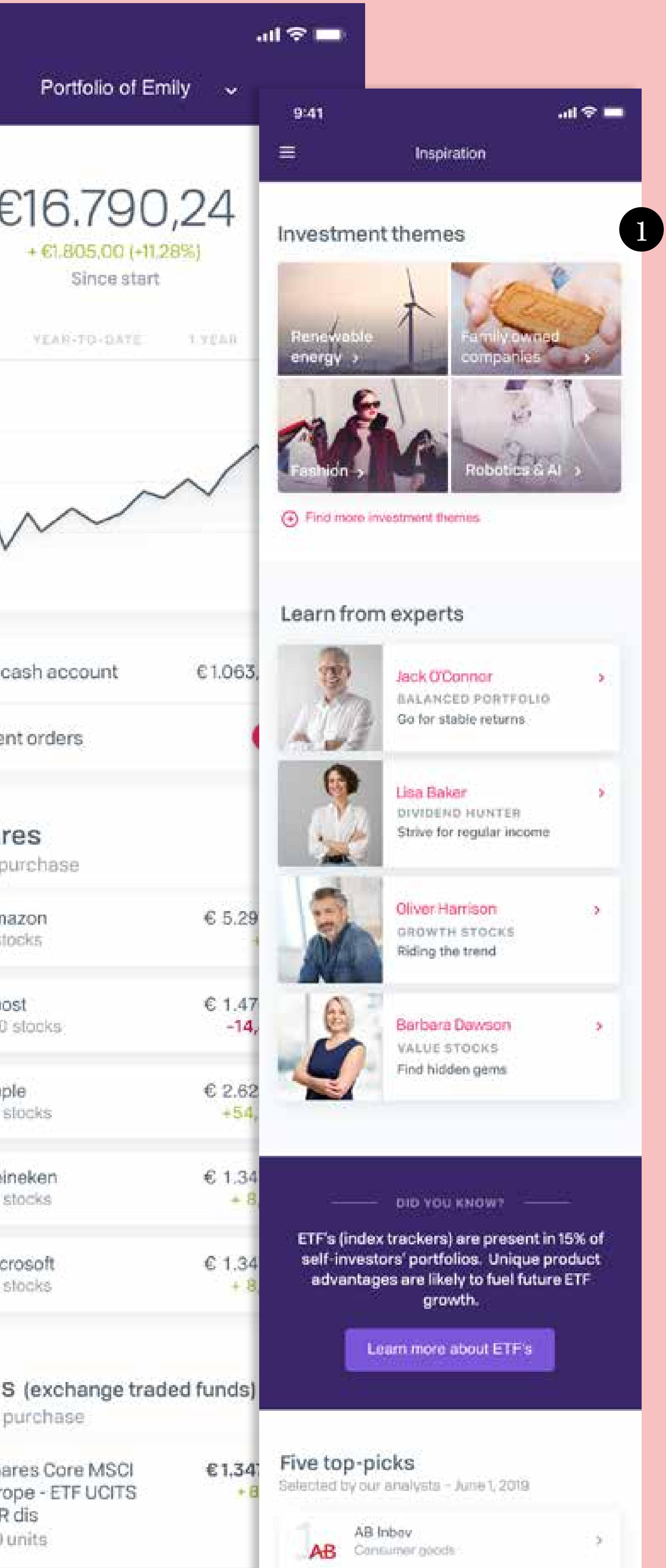

ONBOARD & ENGAGE

Intro for starting investors

MiFID-questionnaire

Edutainment

Intuitive guidance

INSPIRE & EMPOWER

Thematic idea center

Sample portfolios & strategies

Fundamental & technical analysis

Watch list & alerts

CUSTOMIZED REPORTING

Cash balances

Portfolio positions, gains & losses

Orderbook

Cash & securities history

SOCIAL & GAMIFICATION

Benefit from the wisdom of the crowd

Find most popular strategies

Discover most traded stocks

Peer benchmarking

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