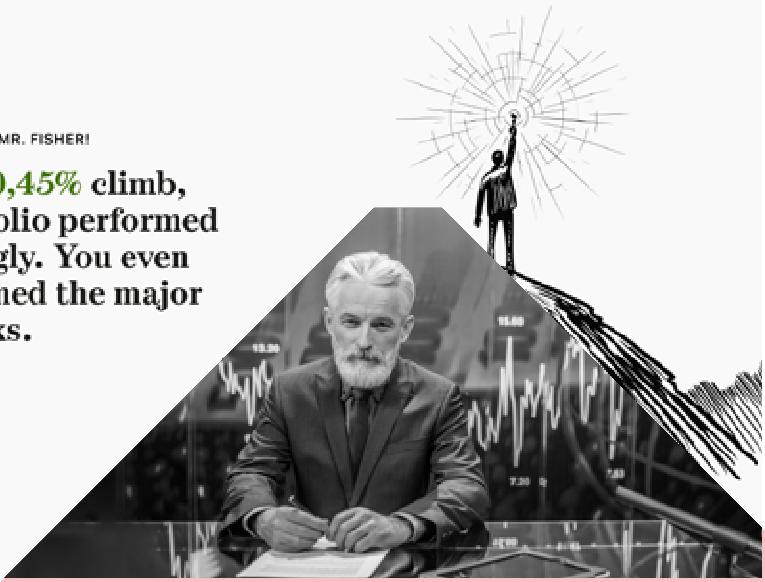
1 January 2019 - 30 June 2019

CONGRATULATIONS MR. FISHER!

With a +20,45% climb, your portfolio performed very strongly. You even outperformed the major benchmarks.



A worldwide ‘first’ new way of ‘telling the story’ of retail client’s portfolio performance.

_ STORYTELLER

InvestSuite

THE ALGORITHMIC FRAMEWORK.

The in-house developed framework is at the core of InvestSuite StoryTeller and is built around five modules.

1. The regime detection algorithm divides the chosen time period into different relevant subperiods (for example a stable period and a more volatile one). This allows for a coherent explanation of the portfolio return performance in each subperiod.

2. A performance decomposition algorithm analyses which elements have contributed to the return of an investment portfolio. Examples are the broad equity market, macro-economic factors such as economic growth, interest rates, currency movements and oil prices, sector effects and individual company performance.

3. Based on the performance decomposition output, the **contributor selection algorithm** analyses what the most important contributors are and aggregates the effects of the smaller ones, such that the bulk of the portfolio return can be explained by a limited number of contributors.

4. The news selection and aggregation algorithm searches all available financial news for the underlying story behind the most important contributors to portfolio performance. It summarises the stories and provides links to longer articles for those who are interested in more information.

5. A visualisation algorithm displays the output from the other 4 modules in intuitive way, combining strong visuals with human storytelling. This allows your end customer to understand the performance of his portfolio and contributes to his financial knowledge.

BUILD YOUR OWN MOST LOVABLE PRODUCT

StoryTeller allows an easy integration in a financial institution's own platform through APIs. StoryTeller is available as an integrated or a standalone cloud-based application and it is consistent with proprietary performance calculations and allows a high degree of customisation (front-end) and parametrisation (back-end).

- Configure the user flow tailored to fit the specific requirements of your customers and value proposition.
- Fully customizable, intuitive design, copy and image library that aligns with your brand.
- Distribute the portfolio report via different channels: i.e. in digital investing environment, via email, pdf, voice, video, …
- Offer on-demand consultation whenever and wherever your customer choses.

Explaining historical performance of an investment portfolio in understandable language to retail investors.

Many retail investors receive almost no information about the reasons for the performance of their investment portfolio.

When they do, it is usually either unintuitive (tables with numbers) or just a high level macro-economic explanation with an unclear link to the actual investments.

Additionally, advisors also experience difficulties in pinpointing the exact reason for an investment portfolio's performance and as a result can't always explain it in a comprehensive way.

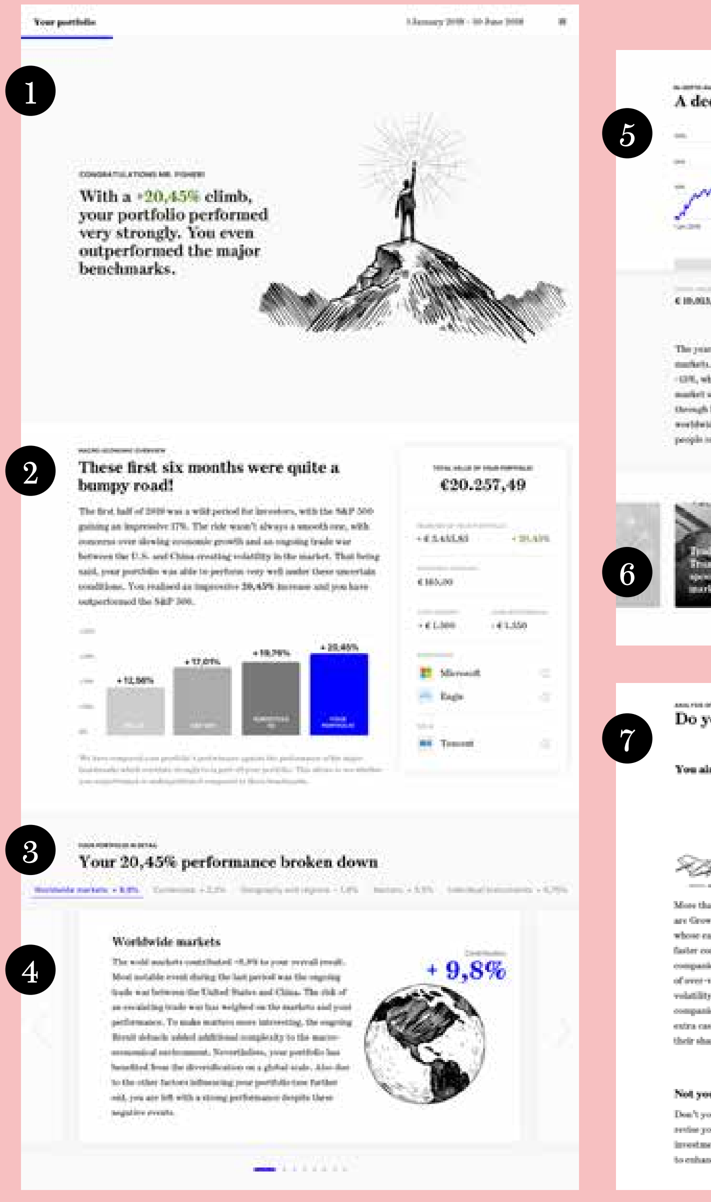
HOW WILL INVESTSUITE STORYTELLER HELP YOU RESPOND TO THE CHALLENGE?

StoryTeller helps to explain portfolio performance in an understandable way to retail investors. It provides an in-depth view of the returns over a chosen time period and illustrates events that have impacted the performance and to what degree. All the relevant information is shown in an intuitive white-label solution, combining strong visuals with human storytelling.

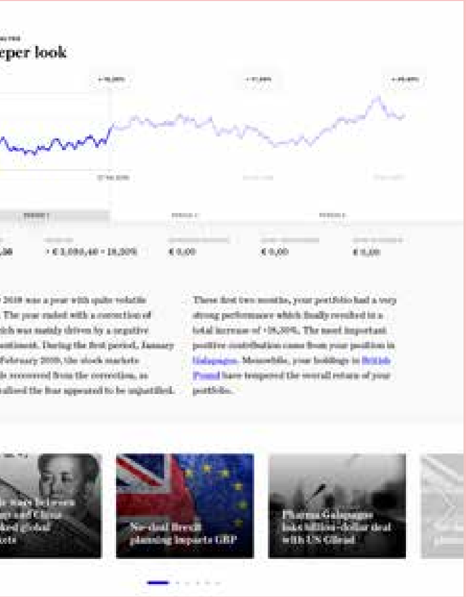
StoryTeller can either support the advisor in his meetings with customers or can be used by customers directly to better understand their portfolio's performance.

By automating the reporting and analysis of portfolio performance, time of analysts and client portfolio managers is freed up.

Increase customer satisfaction, financial knowledge and trust through increased information and engagement.



1. Portfolio cover page: “how did it go”.
2. Tailored macro-economic overview.
3. Factsheet.
4. Breakdown of the actual result.
5. The chosen time period divided into different relevant subperiods. This allows for a coherent explanation of the portfolio return performance in each subperiod.
6. Events that truly relate to your customer’s portfolio and not just to the financial markets in general.
7. Based upon actual portfolio and behavior, a self-directed investor profile is generated.
8. Future view: analyst sentiment and reports to empower the investor in future decisions.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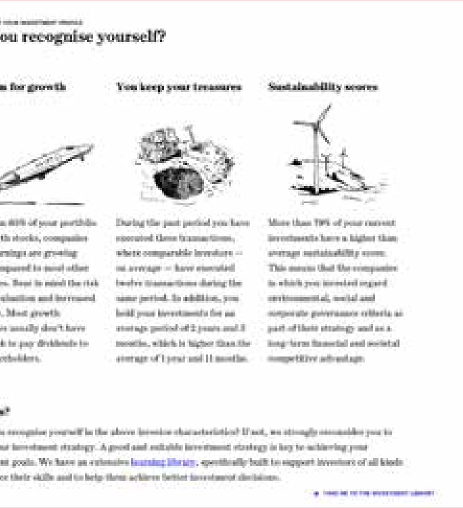
No-deal Brexit planning impacts GBP
Pharma Galapagos inks billion-dollar deal with US Gilead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You keep your treasures
Sustainability scores

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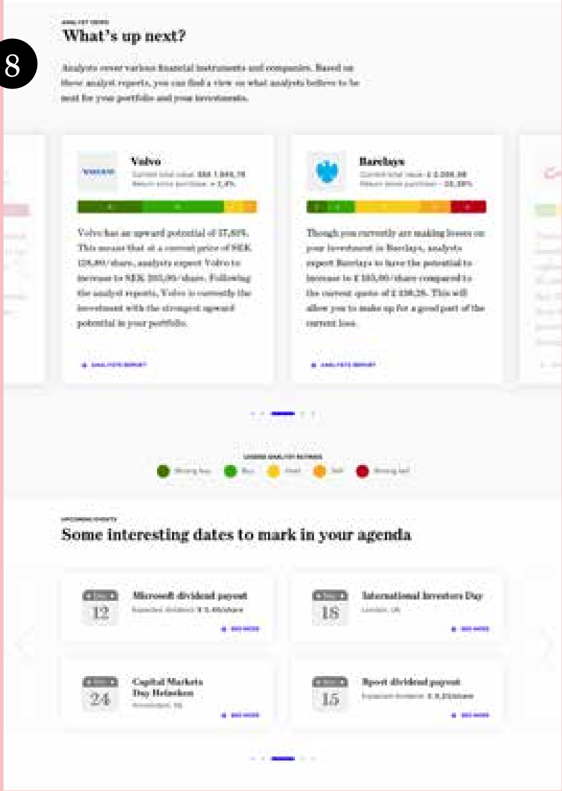
What's up next?
Volvo
Barclays
Some interesting dates to mark in your agenda
Microsoft dividend payout
International Investors Day
Capital Markets Day Heineken
Bpost dividend payout

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

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