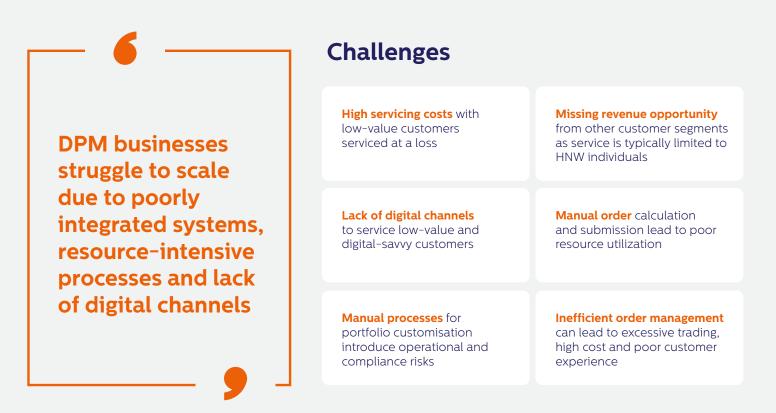


### Explore our Discretionary Portfolio <u>Management</u> Solution

Scale your DPM business by introducing intelligent automation to access new customer segments, introduce efficiencies and controls, and improve customer experience





# Quantifeed scales a financial institution's DPM business with intelligent automation



Access new customer segments



Introduce efficiencies and controls in portfolio management and trading



Improve customer servicing

### **Quantifeed's DPM Solution**



- QEngine Customer application or APIs to power customer platforms
- Support multiple investment propositions, solutions and journeys

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#### Order management

- Automation of order generation and management
- Support straight through processing of orders/trade with minimal manual intervention



## QEngine Portfolio Manager application

- QEngine Portfolio Manager application or APIs to support portfolio manager workflows and e2e journeys
- Manage model portfolios
- Manage, rebalance and view customer portfolios



#### Smart rebalancing

- Bulk (i.e. mass) or single rebalancing of customer portfolios
- Algorithms to optimize for drift, portfolio performance and customer experience
- Algorithms for optimizing top-up and withdrawal instructions



- QEngine Advisor application or APIs to support advisor workflows and e2e journeys
- Customer onboarding, advice, proposal, implementation and servicing



#### **Connectivity to existing systems**

 Leverage existing systems and databases – including core wealth system, market data, and CRM system

### **Benefits**

Minimize manual processing by allowing bulk rebalancing	Create and rebalance model portfolios within compliance constraints using model portfolio integrity checks	Easily match a customer to a suitable model portfolio – recommendation engine based on customer's risk and goal preferences
Allow for customization within pre-configured boundaries/controls	Intelligent automation to minimize manual work and mitigate operational and compliance risks	Automatically generate orders based on investment recommendations and the customer's existing positions
Intelligent order generation to minimize drift, excessive trading and portfolio "locking" due to pending transactions	Connectivity to back-office systems for portfolio reconciliation and reporting	Acquire and service customers more efficiently, especially low-value customers or those wanting a more digital experience

### Why Quantifeed



A powerful, modular, customisable solution to address a range of needs



Making the complex simple

A team you can trust with a track record of delivery

Looking for new digital wealth management solutions to boost your business?

Email us at **sales@quantifeed.com** or visit **https://www.quantifeed.com**