

# InvestSuite

We build B2B Wealth Management solutions. Our clients are financial institutions all over the world, who feel the pressure to speed up their digitisation journeys

Our first product is an AI driven **robo-advisor**, enabling our B2B clients offering personal financial advice to both mass affluent customers as well as HNWI.

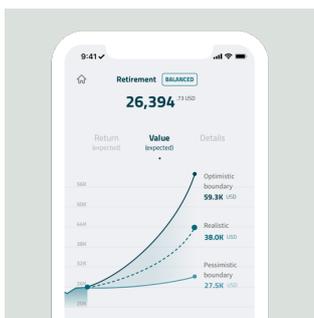
Another product is a best in class **“execution only” investment platform** for retail investors. And probably our most innovative solution is **“Storyteller”**, a complete new way to tell the “story” about the performance of an end customer’s portfolio.

We have defined our own measure of risk, **iVaR**, which is at the heart of our portfolio construction framework. It is based upon how people really experience risk, and is a few generations beyond the often quoted Noble Pricing

Winning MPT model of Markowitz. Portfolios build upon our Oportfolio construction framework outperformed benchmarks and competitors’s solutions during Covid-19.

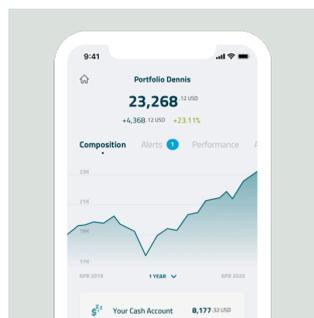
We are also quite unique in delivering hyper personalised portfolios to each end user. We adapt to our clients brand and integrate seamlessly with our clients’ tech infrastructure. We combine deep quant/ asset management expertise, proven banking and investment knowledge, human focused design, and a real understanding of how the ‘backend’ of a financial institutions works.

## OUR PRODUCT SUITE



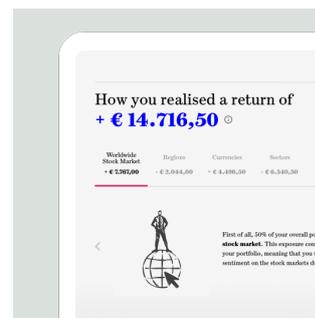
### Robo Advisor

A low-cost, customisable digital wealth management tool



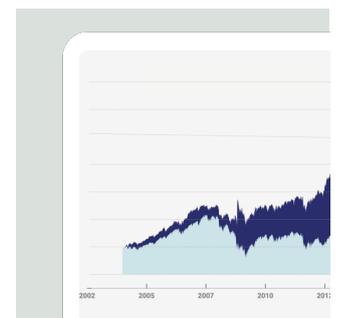
### Self Investor

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



### StoryTeller

A worldwide ‘first’ new way of ‘telling the story’ of retail clients’ portfolio performance



### Portfolio Optimizer

The next-generation quant tools that provide cost-effective solutions for more efficient portfolio management

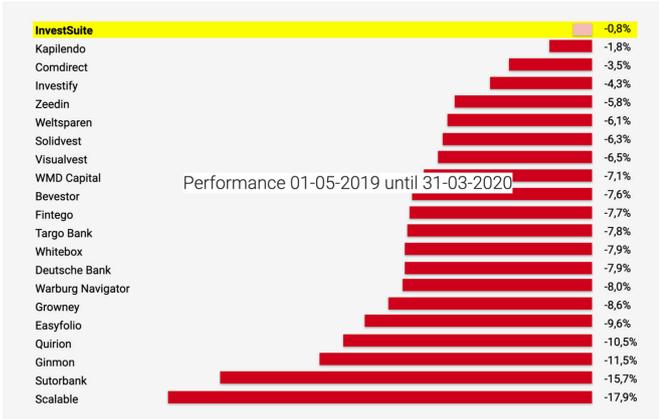
## WE ARE LISTED IN



Financial  
NewTech  
watchlist  
2020

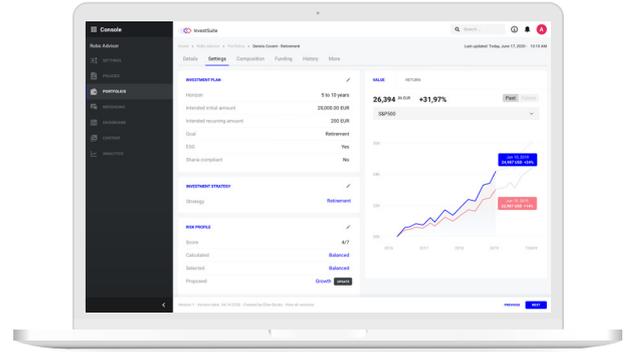


## IVAR PERFORMANCE



iVaR performance in A Robo Advisor real money test

## CONSOLE



Our B2B control room

## MANAGEMENT INVESTSUITE



**BART VANHAEREN**  
CEO / CO-FOUNDER

Founder and CEO of Bolero : N°1 online retail trading platform in BE • Co-founder and CEO of Bolero Crowdfunding: (first Bank-owned Crowdfunding platform in EU • Founder and CEO of KBC Consumer Finance which grew to 2000 people in 5 countries • Set up the CVC fund of KBC Group • Managing Director and Board Member KBC Securities • ...



**LAURENT SORBER**  
CTO / CO-FOUNDER

Co-founder & CTO at Radix.ai, an AI agency • Co-founder of Investimize, a B2C robo advisor • Founding Data Scientist at KBC's group-wide data science lab, • Research Associate at KU Leuven • Ph.D. Mathematical Engineering, Summa cum laude; M.Sc. Mathematical Engineering



**WIM VANHAEREN**  
CHIEF PRODUCT & CREATIVE OFFICER

Founder & Former Chief Creative Officer of Kunstmaan | Accenture Interactive • Managing Director Accenture Interactive • Member of Creative Council Accenture Interactive EALA • Founded Kunstmaan in 1998, grew to biggest independent agency in Belgium • Acquired by Accenture in 2017



**SARA DEPRET**  
COO

Expert In developing organisations: setting up greenfield operations and scaling operations • Director EFESO Consulting (leaders in progression excellence accelerating client's progression) • Managing Director at KBC Shared Services Organisation



**EMMANUEL WILDIERS**  
HEAD OF RESEARCH & DEVELOPMENT

Senior Quantitative Equity Portfolio Manager at Schroders • Vice President at Northern Trust Asset Management • Head Portfolio Construction at KBC Asset Management • Head Quantitative Equity Strategies at KBC Asset Management • 12 years of quantitative asset management experience



**CHRIS EICHHORN**  
HEAD OF BUSINESS DEVELOPMENT

10 years as expat for General Motors finance arm (GMAC international operations) in Brazil, India, Poland & California • Developed outpost finance operations in diverse cultural, legal & economic settings • Board member and head of operations & risk functions Opel Bank India & Poland

## OUR TRACK RECORD SINCE MID 2018

