

AXIOMA WEALTHVISION

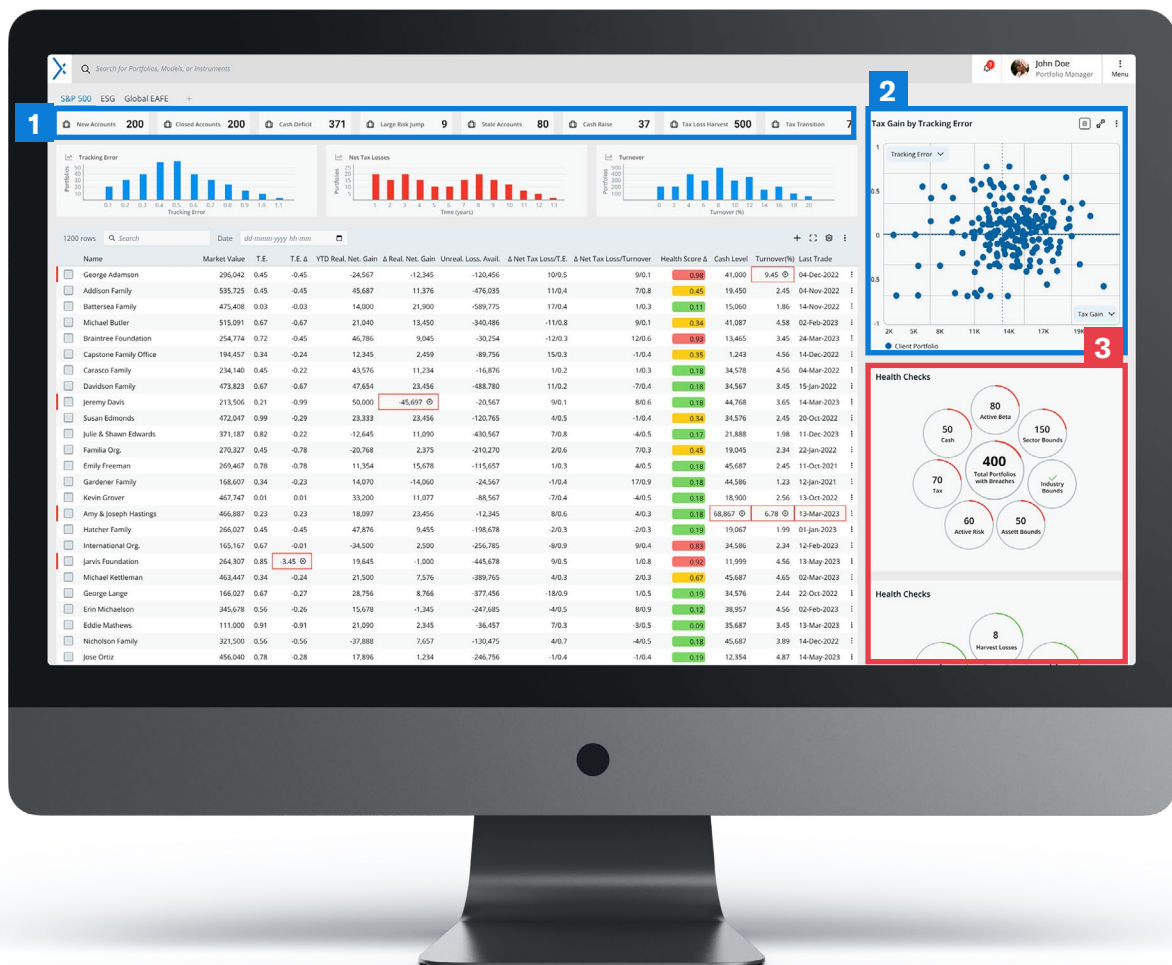
ENABLING FASTER, INTUITIVE PORTFOLIO REBALANCING DECISIONS – AT SCALE

You are responsible for the complex task of rebalancing hundreds, even thousands of portfolios. Your decisions need to be made accurately and quickly. What if you had an off-the-shelf solution that instantly prioritizes the portfolios that need attention?

Now you do.

Powered by the flexibility of a leading optimizer and the power of the cloud, **Axioma WealthVision** provides a consolidated view that helps streamline your optimization and decision-making process.

YOUR PROCESS, ACCELERATED WITH AXIOMA ANALYTICS



1 Quickly filter to focus on common workflows, e.g. New Account Onboarding and Loss Harvesting

2 Detect portfolio outliers at a glance

3 WealthLens: Easily measure the health of your portfolio

WEALTHLENS

WealthLens is a proprietary analytic that leverages machine learning, together with your portfolio strategy inputs, to streamline portfolio rebalancing decision-making.

Improve your ability to explain and understand the drivers of the rebalancing process for internal or client reporting.

1. **WealthLens Overall Score:** An innovative analytic calibrated to your strategy inputs that tells/alerts you when and what to rebalance.
2. **WealthLens Sub-Scores:** Deeper intelligence that identifies the strategy elements driving the recommendation.



Compliance Breaches



Model Portfolio Misalignment



Cash Balance



Tax Saving Opportunities

AXIOMA WEALTHVISION LEVERAGES INSTITUTIONAL-GRADE AXIOMA SOLUTIONS

Axioma Portfolio Optimizer

A purpose-built financial optimizer which allows you to:

1. Rebalance tens of thousands of portfolios in minutes
2. Incorporate account-specific rules for personalization
3. Access a full range of strategy-building options for wealth managers
 - Tax-Loss Harvesting
 - Minimizing Model Drift and Tax Drag
 - Cash Flow Management

Axioma Factor Risk Models

A suite of global, regional and country models with asset classifications and fundamental data that helps you with:

1. Controlling portfolio drift
2. Targeting portfolio characteristics
3. Controlling exposures to sectors and industries
4. Managing country and currency exposures

WITH AXIOMA WEALTHVISION YOU ALWAYS GET:

- 1** Ability to Drive Investment Strategies
 - Load and manage your strategies, benchmarks, model portfolios and portfolio classification data
 - Improve and refine strategies and rebalancing decisions with immediate, incisive feedback
- 2** Seamless integration
 - APIs for streamlined connectivity to your OMS, EMS and other workflow systems
- 3** Superior customer service
 - Optimization and technology experts to support your implementation every step of the way