



A Value-Added Alternative to Morningstar & Zephyr

Portfolio Analysis and Investment Planning: Register for a Free Trial

### Portfolio Research Reports & Proposals

Generate Portfolio & Investment Analytics including Hypothetical vs. Actual Performance based Risk vs. Return and MPT statistics such as Alpha, Beta, R<sup>2</sup>, Sharpe Ratio, Up and Down Market Capture, Information Ratio and more.

Review asset allocation and correlation for diversification insight as well as equity and fixed income metrics for indications as to growth vs. value tilt and interest rate exposure.



### Placemark Integration

Launch Investment Hypotheticals, Fact Sheets, Detailed Analytics and more directly from Placemark UMA Marketplace™.

Compare your own Custom Model Allocations vs. a Client or Prospect Account Allocation with the CompariScan.

Find top performing managers for various investment strategies using AdvisoryWorld’s investment screening functionality.

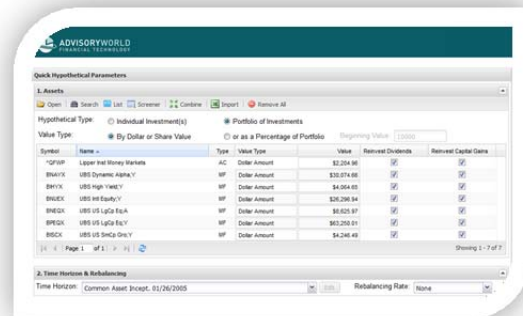


### Model Allocation and Performance Analysis

Access, Analyze and Compare Models.

Blend Model Allocations and Historical Model Performance and create “Models of Models.”

- Historical Allocation Change and Trade Support
- Mutual Fund, ETF, Closed End Fund, Stock, SMA, Bond Variable Annuity and Index Data



Build your own Custom Model Allocations using AdvisoryWorld’s portfolio optimization tools.

Differentiate your portfolio analytics and investment planning offering with highly customizable reports. Enjoy using this intuitive application which features seamless integration with Placemark. Join the elite team of successful advisors making the switch to our value-added alternative to Morningstar.



## Key Benefits

- Back-test Portfolios for Proposal, Periodic Review and Suitability Purposes
  - View Risk, Return and essential MPT Statistics of Current and Proposed Portfolios
- Demonstrate how hypothetical investment landscape changes would have affected Portfolios
  - Assess the impact of variables such as Taxes, Fees, Inflation, Cash Flows and Rebalancing
- Clearly illustrate portfolio diversification and value investing
  - Analyze Equity, Fixed Income, Region, Sector and Overlap characteristics on the HoldingScan report
- CompariScan Proposal Generation
  - Compare two Portfolios, Models and/or Investments side-by-side
- Save time and eliminate data entry errors through Integration
  - Import Client Account and Position Information accessed from Orion Advisor

## Differentiating Factors

- *Reports*
  - Morningstar reports are becoming run-of-the-mill
  - Look & Feel: Easily modify logos and branding
- *Efficiency*
  - Integration: Placemark, Veo from TDAI, ORION Advisor, Albridge Wealth Reporting, Blueleaf, eMoney, Salesforce, Redtail and more
  - Import portfolios from Microsoft Excel and assess allocation changes
  - Speed: Build and Analyze a Portfolio Much Faster than with Morningstar Workstation and Office. Our app is faster, period.
- *Support*
  - We recognize that successful training of users with webinars, videos, documentation and on-site presentations is vital to our relationship with your firm.
- *Price*

Contact AdvisoryWorld for more information: [sales@advisoryworld.com](mailto:sales@advisoryworld.com) 800-480-3888x105