

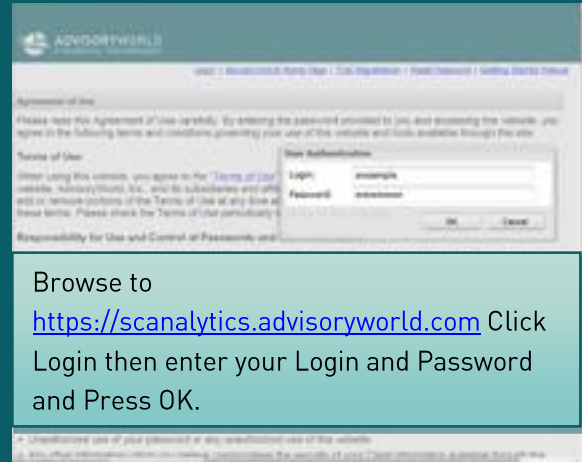
# SCANalytics Portfolio Analysis & Investment Planning at its finest, and easiest

## Features & Capabilities

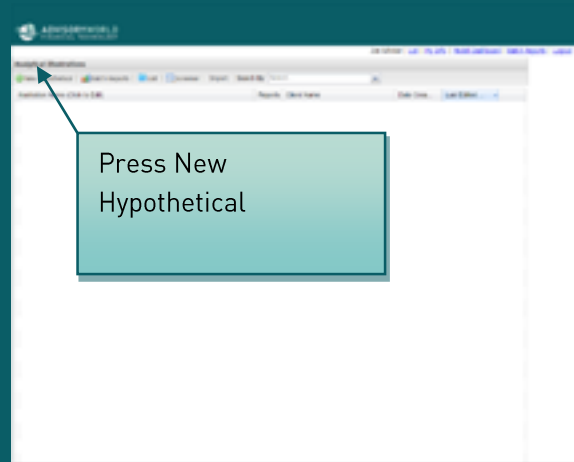
SCANalytics allows users to easily and accurately review the effect of dividend and capital gain reinvestment, various fee applications and rebalancing on the hypothetical growth of a portfolio or investment. Adjust time horizon settings for any historical time period, set financial goals, contributions and withdrawals, rebalancing frequency and tax rates to analyze back tested illustrations. Users may also screen for assets based on criteria such as MPT statistics, expenses, manager tenure and classification. AdvisoryWorld SCANalytics allows users to build CompariScan reports which compare 2 portfolios, models and/or investments vs. one another and are used as quantitative proposals. The portfolio and security analytical capabilities run the gamut from basic portfolio review to sophisticated MPT analysis, methodologies, and risk assessment. Features include Modeling and Optimization, Monte Carlo simulation, Security Analysis and Fact Sheets, Comparative Review, Proposal Generation, and Administrative Controls. Globalization and customization is always available to provide the functions and features that individual firms may require.

## Integration

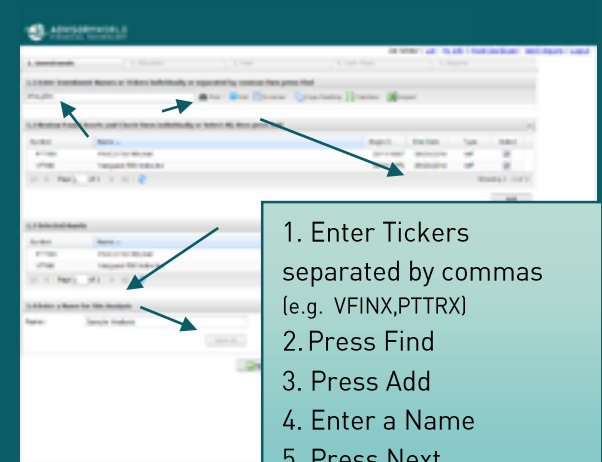
AdvisoryWorld's SCANalytics application's open architecture lends itself to accepting client information and position data from third parties including many widely used portfolio management, Financial Planning and CRM systems.



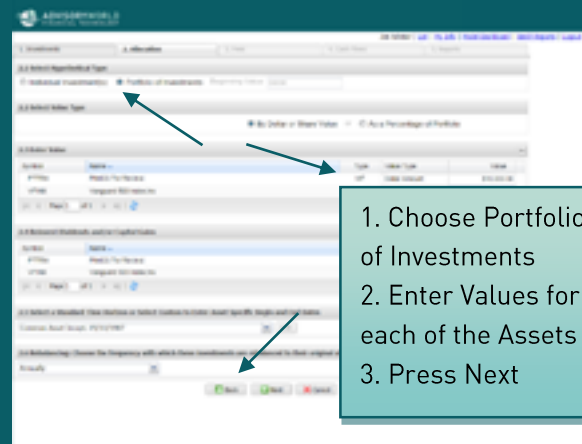
Browse to <https://scanalytics.advisoryworld.com> Click Login then enter your Login and Password and Press OK.



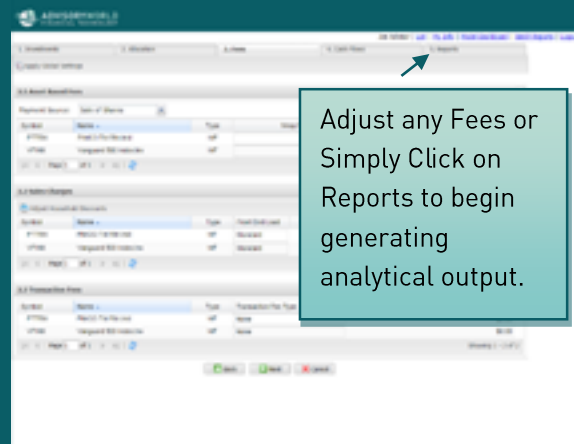
Press New Hypothetical



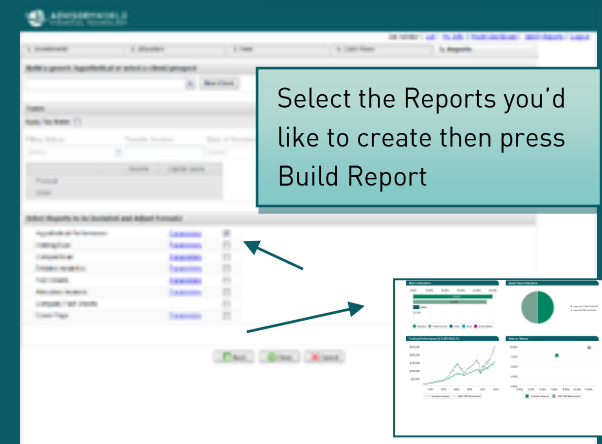
1. Enter Tickers separated by commas (e.g. VFINX,PTTRX)
2. Press Find
3. Press Add
4. Enter a Name
5. Press Next



1. Choose Portfolio of Investments
2. Enter Values for each of the Assets
3. Press Next



Adjust any Fees or Simply Click on Reports to begin generating analytical output.



Select the Reports you'd like to create then press Build Report