

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.

