

# FE Analytics – your one stop shop to financial planning



FE Analytics is a powerful, industry leading and award-winning web based financial planning tool developed by Financial Express (FE) available through Intelligent Office (iO).

This one-stop shop for all your investment research, investment analysis, portfolio construction and monitoring requirements is available directly through an integration with iO, giving you more time to focus on generating new business and managing your existing client base.

## Benefits for you



Access to an award-winning tool for all your fund research needs



Ability to launch FE Analytics directly from iO at the click of a button



Share data between iO and FE Analytics and make rekeying data a thing of the past



Store your FE Analytics reports within iO



Create categories and sub-categories for reports when importing from FE Analytics

## FE Analytics - key features

### Fund research

FE Analytics is whole of market and enables you to compare funds and portfolios using a range of performance measures and statistical calculations.

### Clean share classes

Clean share classes have such little history that advisers often struggle to produce any meaningful performance data. FE Analytics has attached the old history onto the new clean share classes, so that you can analyse these newer investments using the same detailed analysis as you would on any other share class.

### Fund documentation

FE Analytics provides access to documents including fund provider factsheets, KIIDs, Simplified Prospectus' and more.

### Fund manager analysis

It can be difficult to analyse a recently launched fund, but the fund manager comparison tool allows you to look at the absolute and relative performance of a fund manager over the years.

### Portfolio comparison report

A concise 'reasons why' document you can use to justify why a client should move from one portfolio to another is available. All reports can be branded with your adviser company logo.

### Custom portfolio report builder

The integration allows creation of a high quality report incorporating everything your client wants to see, including performance, KIIDs, portfolio breakdown etc.