PRODUCT INFORMATION

# FE ANALYTICS

FE ANALYTICS+
RESEARCH, INVEST, CONNECT

## Powering successful investment advice

FE Analytics is an industry leading research solution for comprehensive fund research, portfolio analysis and reporting. FE Analytics combines over 20 years of investment data collection expertise with cutting-edge software to help financial advisers and their teams create a robust investment proposition.

FE Analytics has been powering investment decisions for over a decade and focuses on providing advisers with an efficient solution to build successful centralised investment propositions and improve profitability whilst remaining compliant and keeping costs down.

Currently, over 3,000 UK firms use FE Analytics to streamline their investment process, generate new business and provide a better service to their clients.

### Data you can rely on

FE is a leading provider of investment data to the financial services industry, supplying data to advisers, fund groups and financial trade publications. FE Analytics gives you the ability to adopt a whole of market approach with access to over 300,000 financial instruments including Unit Trusts & OEICs, Investment Trusts, pension funds, ETFs, VCTs and original fund documentation including factsheets, annual reports, prospectuses and KIIDs.

We are a fully independent source of data. Our ISO 9001 certified data teams collect and process third party data objectively with 99% of the available data refreshed daily to reflect latest prices.

- Our solution helps you save time by not having to trawl multiple data sources
- Being truly independent means we are free from bias and can help you comply with the FCA's calls for objective due diligence
- We have been at the forefront of championing the collection and distribution of clean share class data to advisers.

### Supporting your investment process

Whether you build your proposition through the more traditional fund selection route or prefer to outsource, FE Analytics provides you with the right tools to improve efficiency in each stage of your investment planning process.

The wide variety of research, modelling and reporting tools available on FE Analytics can help you optimise your investment selection, conduct objective due-diligence, and demonstrate the value of your service in a streamlined, fully compliant and profitable manner.

#### Client Profiling

- The inbuilt EValue Attitude to Risk Questionnaire assesses your client's attitude to risk through a series of intuitive questions and assigns clients to one of five risk levels.
- Establish your clients' capacity for loss with the Investment Forecaster tool which plots the likely returns of different asset allocation during various time periods – giving clients a better understanding of the trade-off between risk and return.

#### Investment Research

- The powerful fund filter tool allows you to easily browse through 300,000 financial instruments to shortlist funds, sectors or managers according to your selection criteria
- Conduct meaningful analysis on your shortlist by reviewing extended performance data, ratios, volatility, manager information, fees, asset breakdown, regional breakdown, peer group comparisons and more
- Access FE Crown Fund Ratings, FE Alpha Manager Ratings, FE Risk Scores, RSM ratings, Morningstar ratings and more at no additional cost
- In addition to the standard fund universes, FE Analytics also provides advisers with a new risk targeted Multi–Asset universe.

### Portfolio Analysis

- Build client portfolios from scratch using the FE Analytics Dynamic Portfolio Builder tool
- The historic capabilities of the tool allow you to mark fund switching and to assign full portfolio weightings
- You can also use the Excel uploader to on-board existing client portfolios onto Analytics with ease
- Conduct comprehensive portfolio comparisons to highlight the value of your recommendation against a client's current portfolio, benchmarks, funds and more
- Review and conduct objective analysis on your DFM and Model Portfolio data.

### Communicate your investment research to clients

- Use a wide variety of presentation tools including dynamic charts, tables and graphs to present information to clients in an easy to understand format.
- Create bespoke portfolio reports using the Custom Portfolio Report Builder to suit your specific requirements.
- Export 'short, medium or long' portfolio scans with a comprehensive range of details on your portfolio including individual factsheets, asset breakdown, performance and more.
- The bespoke portfolio reports and scans can be white labelled to suit your brand and maintain professional standards.
- The Client Manager system allows you to quickly save and refresh research for a particular client.
- All portfolios saved on our systems reflect current prices – allowing you to easily automate client reviews.

## Integration

FE Analytics is integrated to a number of leading back office systems including Intelliflo. This allows you to import client portfolios from your back office system for analysis and seamlessly export outputs back.

## Training and support

We have specialist support and training teams who provide extensive and ongoing training and support to all our clients. The support team are available by telephone, email and live chat.

## Our commitment to you

Our solution is tailored to support the ever growing regulatory demands and business challenges faced by advisers today.

We currently support over 3,000 firms across the UK ranging from directly authorised advisers and network representatives to paraplanners and wealth managers. Our growing client base consistently credits FE Analytics for the value it adds to their service.

## Contact Us

Contact us at **enquiries@financialexpress.net**
for more information or a free trial.

## Our credentials