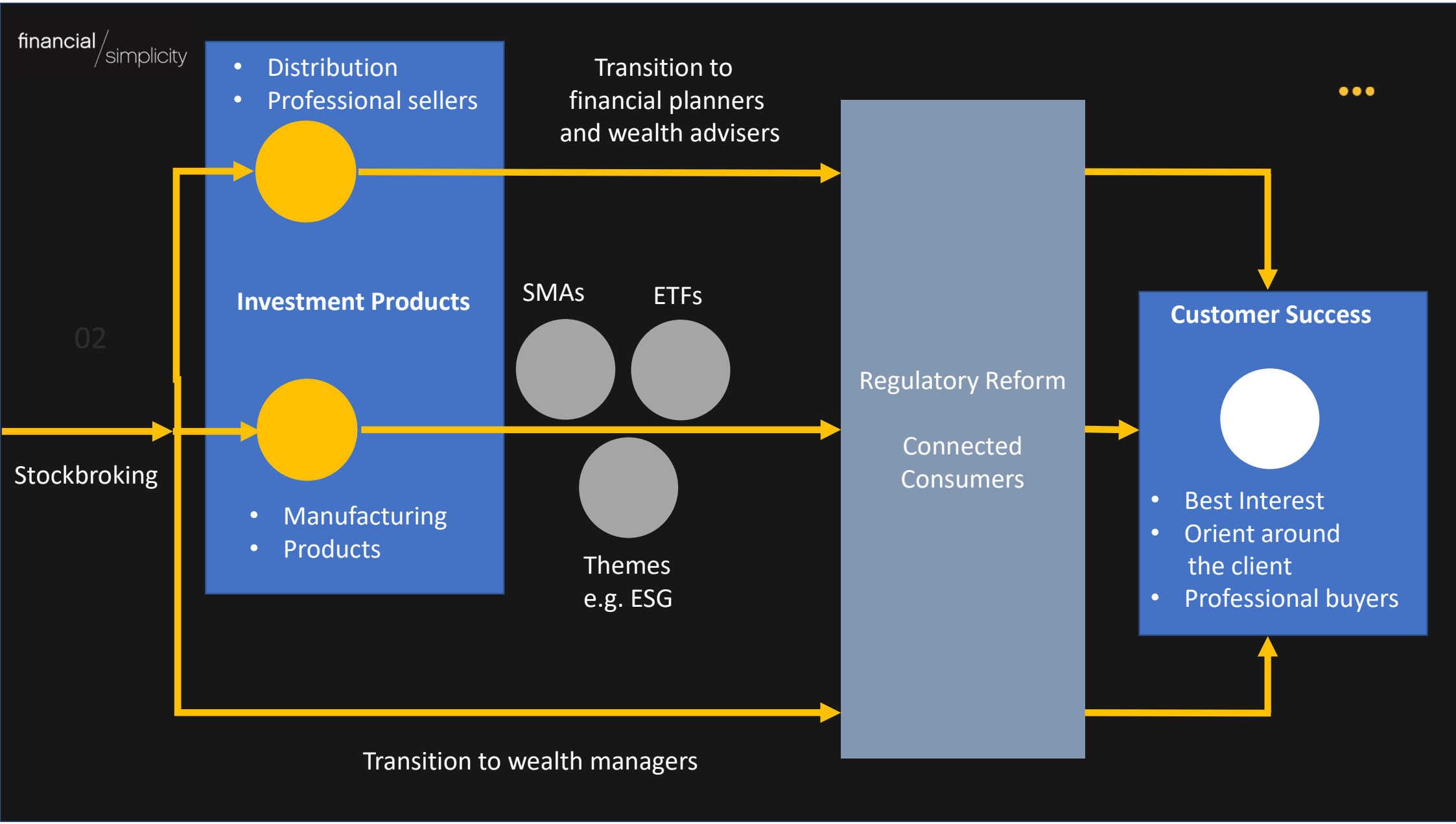


How investing is **evolving**

Stuart Holdsworth
Financial Simplicity

The digital solutions to deliver
personalised portfolios to clients at scale



Consumers increasingly...

- Demanding
- Judge on value
- Seeking ease of use
- Skeptical

As investors seeking...

- Aggregation (all in 1 place)
- Ease of use
- Transparency
- Net performance
- About me
- Value for money

Licensees providing...

- Investment philosophy
- Investment strategies / model portfolios
- Compliance frameworks

Advisers / wealth managers seeking to deliver...

- To investor needs and wants
- To licensee requirements
- With efficiency and scale
- ...their way

New Benchmarks

- Onboard in seconds / minutes
- Relevance to me
- Phone apps
- Proximity to decision making

New Benchmarks

- No brokerage ETFs
- Cash
- Direct ownership

Economic reality suggests..

- Service **more** clients
- Deliver more **value**

Client personalised portfolios to licensee frameworks ... at scale

Delivering Personalised Portfolios At Scale

- 'Platform' aggregation, yet separation
- Your investment philosophy
 - Categorising investments your way !
 - Range of investment strategies / model portfolios
- Client personalised /best interest investment mandates
 - Value creating
 - Best interests
- Constant portfolio monitoring and alerting
- 'Intelligent' one-click portfolio modelling

Showcase

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HOW INVESTING IS EVOLVING

with
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