

Sharesight ~~Coming to~~ Has Arrived at a Client Near You

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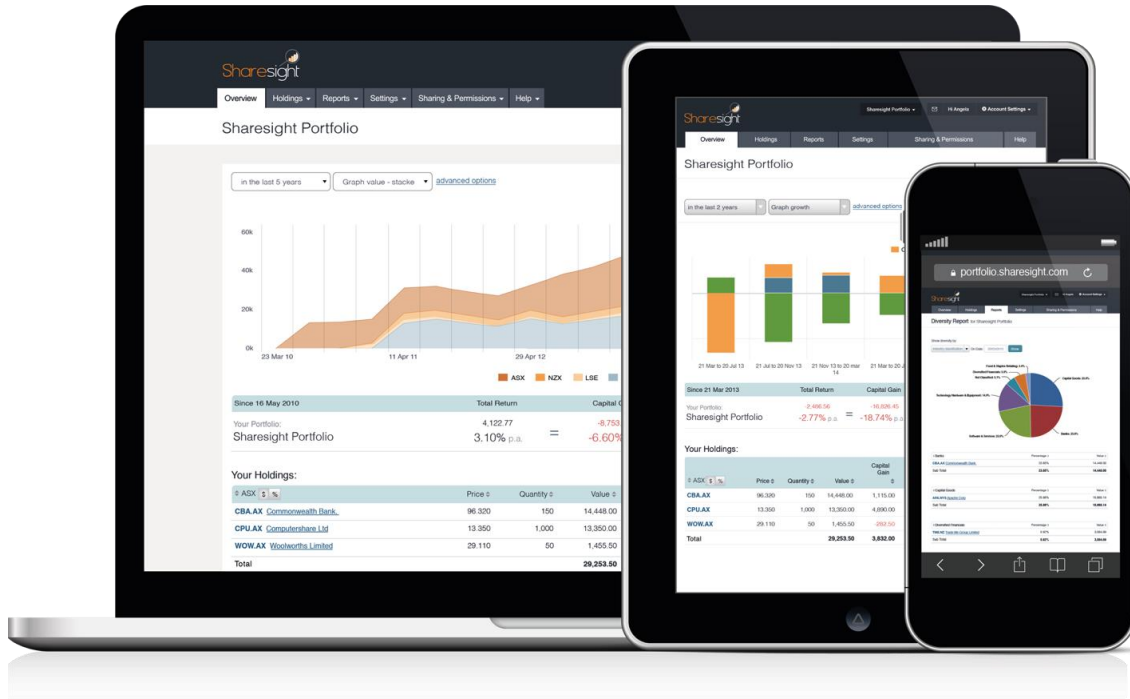
@sharesight

5 December 2017



Sharesight

The solution for investors & next gen advisors



- ✓ Focus on investors
- ✓ Performance & tax reporting
- ✓ Automatically records trades, dividends, DRPs
- ✓ Automates most corporate actions
- ✓ 20 years historical data
- ✓ Track all global listed securities & managed funds
- ✓ Mobile

Sharesight

Evolution of client advocacy

- CRM
- Advice
- Research
- Execution
- Reporting
- Accounting
- Legal
- Budgeting



Sharesight

Marketplace – for investors & advisors

The screenshot displays the 'Partners' page on the Sharesight website. At the top left is the Sharesight logo. To the right are 'SIGN UP' and 'LOGIN' buttons, and a hamburger menu icon. Below the logo is a breadcrumb link '< Partners'. The main heading is 'Partners'. A 'Jump To' section contains a list of filter categories: 'All' (highlighted), 'Accountants', 'Accounting Software', 'Asset Managers & Robo-Advisors', 'Associations', 'Brokers', 'Data Providers', 'Financial Advisors', 'Other', and 'Research Providers'. The main content area features a 3x3 grid of partner cards. Each card includes the partner's logo, their role, a brief description, and a 'LEARN MORE' button.

Partner	Role	Description
Morningstar	Data Provider	Morningstar is a leading provider of independent investment research.
CMC stockbroking	Broker	CMC Markets Stockbroking is Australia's best value online broker.
ANZ	Broker	ANZ New Zealand is the country's largest financial services group.
pwc	Accountant	PwC is a multinational professional services company.
Deloitte.	Accountant	Deloitte is a multinational professional services company.
KPMG	Accountant	KPMG is a multinational professional services company.
xero	Accounting Software	Xero
@squared	Financial Advisor	A Squared Advisers
abletech	Other	Abletech

Sharesight

B-to-C model born in the freemium age

Client Acquisition

Thought leadership
Digital advertising

Conversion

UX investment
Digital support
Valuable features

Portfolio Setup

Data automation
Broker integrations

Engagement

Auto nudges
Web training
Product never done –
bitcoin next!

Free

Paid

Sharesight on-boarded 4,219 new clients in November

Sharesight

Try it for your portfolio – sharesight.com

