



## MARKET AND PORTFOLIO INTELLIGENCE ANALYTICS

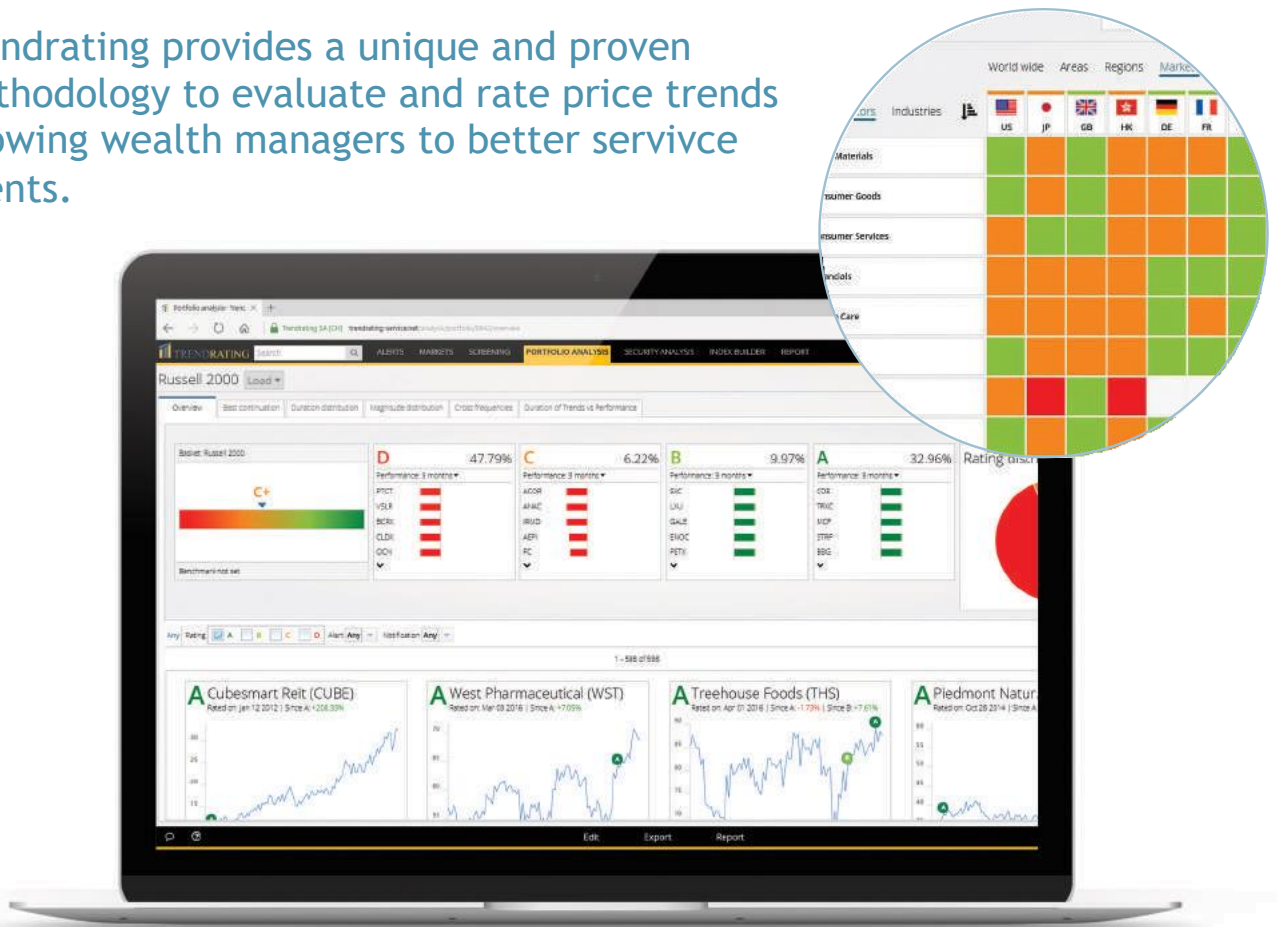
*Powering Wealth Managers with Analytical Data to Maximize Investment Returns and Better Control Risk*



## How does Trendrating enhance my existing investment process?

- Capturing a large part of bull trends and avoiding most of the bear trends in individual stocks, ETFs and sectors over different market cycles is the essence of successful investing.
- Trendrating provides proven, intelligent analytics and solutions to maximize trend capture across markets and securities. The positive impact on returns and long term performance is fully transparent and measurable.
- Our customers use our rating grades (A,B,C,D) and underlying numeric scores to complement their investment decision process which enhances returns and reduces risk.
- Analyze individual stocks and sectors to validate ideas and spot opportunities. Rate your portfolio exposure to positive vs. negative trends and rebalance the exposure for maximum performance.
- Our models are designed to self-adjust to market conditions and use adaptive time windows to spot trends sooner than other static models.

Trendrating provides a unique and proven methodology to evaluate and rate price trends allowing wealth managers to better service clients.



## The platform is comprised of easy-to-use modules:

### Alerts

Let's you stay on top of Trend Capture changes to securities in your portfolio to exit high risk holdings.

### Markets Analyzer

Calculate the weighted Trend Capture rating by region, country, sector & industry for smarter selection and allocation.

### Portfolio Analyzer

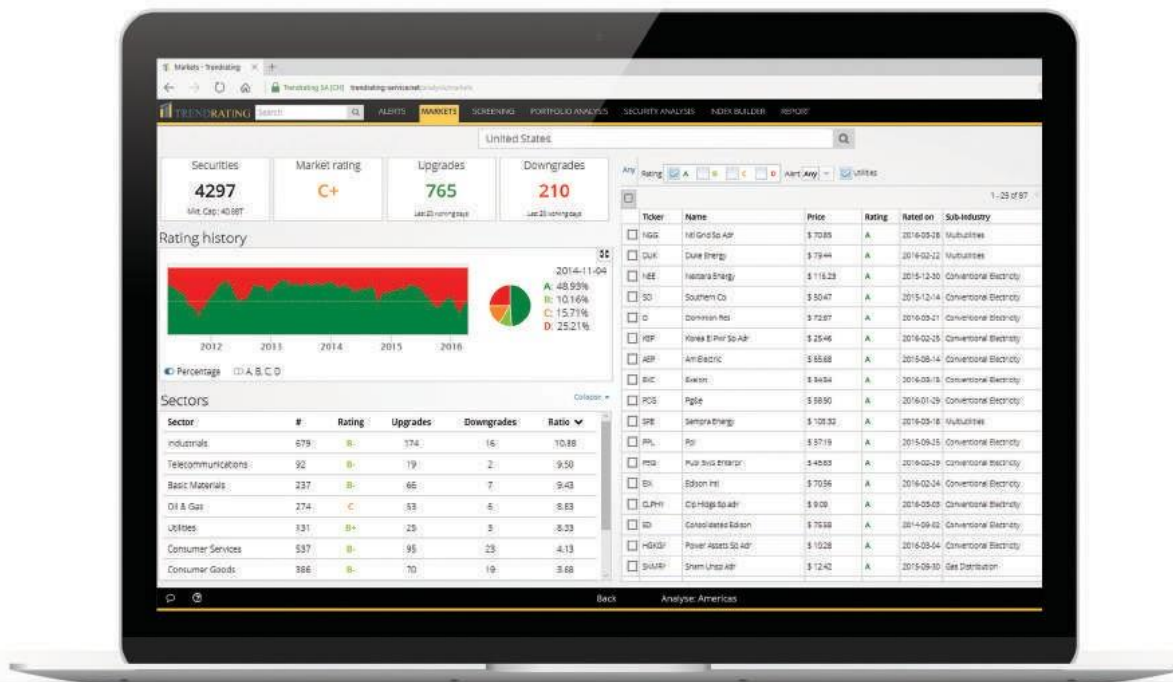
Leverage our Trend Capture Model to run regular health checks on your portfolio and maximize profits while reducing risks.

### Portfolio Optimizer

Run custom built Trend Capture strategies against your portfolio for optimal tactical allocation to switch out of C & D rated stocks.

"I use it every day. I enter client portfolios and get daily updates on them. I always look at how a stock is ranked before buying it."

- Morgan Stanley, Financial Advisor -



"The constant addition of new features is remarkable, especially the stock ranking screener. It's helping me save time when setting my asset allocations in the portfolio building process."

- UBS Wealth Manager -

## Screener

Find the best trends across single securities, countries, sectors and markets and rank your actual holdings within your investment universe.

## Security Analyzer

Enables you to drill down into individual securities to gauge trend Duration, Magnitude and Upside Potential, as well as how a security compares to its peers.

## Strategy Builder

Gives you the power to easily design and test complex momentum alpha and smart beta strategies that leverage all of Trendrating's advanced algorithms.

## Excel Add-in

Export all ratings data to your existing spreadsheets to rank stocks and ETFs by Smart Momentum, % Capture or Avoidance, Retracement, etc. for better selection.