

Expersoft PM1e - Module Data Sheet

INVESTMENT PROPOSAL SYSTEM (IPS)

PM1e IPS optimizes the decision-making process at the point-of-sale with instant and automated generation of investment and rebalancing proposals. Matching the size of the investment and the asset allocation of the client's profile with the appropriate model portfolio of the financial institution, PM1e IPS creates a proposal that is customized to each individual client's needs and complies with internal guidelines.

Business Case

Point-of-sale staff's capability to quickly and automatically generate customized investment proposals that satisfy each client's individual demands and comply with internal and external guidelines and policies is an important asset, particularly in fast-paced private and mass-affluent banking environments.

Key Benefits

- Gains for client acquisition, investment analysis, and customer service
- Proposals compliant with company investment policies and guidelines, recommendation lists, and legal requirements
- Customized proposals compliant with individual client characteristics and consultant preferences

Key Features

- Internet or Intranet based deployment
- User-friendly usage and comprehensible workflow
- Multi-lingual user interface and reporting tool
- Management of investment strategies and model portfolios
- Management of profiles and questionnaires
- Management of recommendation lists and investment proposals
- Prospective and retrospective evaluation for any time periods
- Extensive evaluations with matrix, spreadsheet and graphical elements for any time periods
- Benchmark and risk comparison to investment proposals and clients portfolios
- Simulations und basket evaluations for any time period
- Straight Through Processing
- Automated creation and routing of orders
- Interfaces to third party systems

The PM1e Platform

Expersoft PM1e is a comprehensive and versatile wealth and asset management platform. It provides financial service firms with an unrivaled width of capabilities to analyze, plan, implement and control investments within one flexible, integrated, and easy-to-use environment.

Expersoft tailors the various PM1e components to solutions which precisely meet our customers' requirements in scope and scale and support a truly Straight Through Process from relationship management to investment decision, order management, and financial accounting.

About Expersoft

Expersoft Systems provides leading-edge software products and services for retail and private banks, family offices, asset managers, brokers, and other financial service firms.

Founded in 1992, Expersoft currently serves over 200 clients worldwide from its headquarters in Switzerland and through its subsidiaries and distributors in Europe, the Middle East, Asia-Pacific and North America.

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