TRADITIONAL REPORTS OFTEN MISS THE MARK

- Spreadsheet-style
- All about data & information
- Limited personalisation
- Usually print-based
StoryTeller

Turn portfolio performance reporting into a 21st-century experience
A sudden change in sentiment after a season of bountiful growth

January 1, 2020 - March 31, 2020
While the surprise sell-off in global stock markets had the biggest impact on the value of your investment, your bond and technology sector holdings did contribute positively to your portfolio performance.

Variable markets:

- $22,753

The climate changes for worldwide stock markets

The European markets experience global headwinds

- $3,165

Our investment managers face different challenges in managing diverse, dispersed global, emerging market, and developed market equity and fixed income portfolios. We approach these challenges by taking a more active management approach to respond to market changes, adjusting the allocations of your portfolio as underlying market conditions change.

For any further questions, please contact us or visit our website. We are here to help you navigate through the global market landscape.
The technology sector remains well-rooted in the storm

Harvesting a steady income stream

InvestSuite

Good to know

Performance Attribution (PA) is the allocation of performance between a portfolio's components, such as assets, sectors, and countries. PA is used to understand the sources of returns and risks within a portfolio, providing insights into how different factors contributed to the portfolio's performance. It helps investors and managers identify areas for improvement and make informed decisions.
The companies in your portfolio did very well ecologically.

161 tonnes CO₂

161 tonnes of CO₂ emissions equate to the absorption capacity of 8,050 trees!
Our advice for your portfolio during the coming quarter will be along these lines:

We are very positive on the Worldwide Stock Market, and would therefore like to increase your exposure from 50% to 55%.

On the contrary, we are a bit worried about the Consumer Defensive Sector, and would therefore like to decrease your exposure to this sector from 20% to 15%.

When making shifts in your portfolio, we would also increase your exposure to the European markets at the expense of your exposure to the Emerging markets.

We believe there is still a lot of upwards potential. It’s a good time to be invested in the markets. I am looking forward to 2023 together with you.
More than half of our employees worked at a financial institution.
- Co-founder & CEO Bart was CEO & board member at KBC Securities.
- MD Asia Pacific Tim Smith was Senior Executive at Westpac Private bank.
- COO Sara Depret & Head BD Chris Eichhorn worked for KBC group

A very strong team of PHD level quants who have worked at the best data science labs and asset management firms. Algorithms power our products and provide the

A very experienced team that has built multiple digital products for a broad range of financial institutions including insurance companies, retail banks, investment banks, online brokers, family offices, crowdfunding platforms.

Front-end developers, designers, human insight experts, brand specialists and (digital) marketeers who used to work together with multi-disciplinary teams for finance brands. This gives us the opportunity to build the InvestSuite brand and advise clients how to successfully launch our solutions.

OUR DIFFERENTIATOR - WIDE RANGE OF DEEP SKILL SETS UNDER ONE ROOF

BANKING & INVESTMENT

QUANT / AI / MACHINE LEARNING

DIGITAL PRODUCT DEVELOPMENT

DESIGN, BRANDING, MARKETING
InvestSuite was recognised as one of the world’s most innovative solution providers in WealthTech100 in 2020 and 2021.

The WealthTech100 is an annual list of one hundred of the most innovative technology solution providers for asset managers, private banks and financial advisors. It is chosen by a panel of industry experts and analysts. Those who were selected were picked from a list of over 1,200 companies produced by FinTech Global, which is a specialist research firm working with market leaders in the financial technology industry.

InvestSuite has been included in the Financial NewTech Watchlist 2020.

This is an initiative launched by Capgemini & Efma and powered by FinTechVisor, with the aim to select the best financial NewTech solutions and the most exciting collaborative projects between new technologies firms and financial institutions. The watchlist has been compiled by a selection committee composed of Efma and Capgemini experts and includes 100 B2B fintech start-ups and scale-ups worldwide.

InvestSuite, had been accepted into Intel’s prestigious “AI-Builders” ecosystem.

The ecosystem represents some of the world’s leading independent software vendors and fintechs, system integrators and financial institutions. The two companies will work together through Intel’s technical enablement program to optimise InvestSuite’s algorithms and artificial intelligence framework on Intel’s 3rd generation scalable CPUs.
We help financial institutions realise their digital wealth transformation journeys
Thank you

Chris Eichhorn
Business Development
chris.eichhorn@investsuite.com
+48 601 900 015

Mathieu De Baets
Product manager StoryTeller
mathieu.debaets@investsuite.com

DISCLAIMER
The information contained within this document relates to Investsuite N.V. information, products and services. This information is confidential and no part may be reproduced or reused for any commercial purposes whatsoever without the prior written consent of Investsuite. While all reasonable attempts have been made to ensure the accuracy, completeness and reliability of the content, all information is provided ‘as is’ and is based on the information provided by you. There is no guarantee as to the completeness, accuracy, timeliness or results obtained from the use of this information and Investsuite will not be responsible and cannot be held liable for any decision made or action taken in reliance of such information.