Fast, Cost-effective & Sophisticated Investment Analytics for Wealth Managers

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How HedgeSPA Can Solve Problems For Wealth Managers

*"**HedgeSPA** allow relationship managers (RM) to simulate research scenarios while investors are still on the phone. Understandably, RMs want the investors to decide when brilliant research outputs are viewed as relevant."*

*"Instead of expecting interns to match our long list of approved products against investor portfolios, **HedgeSPA** does so automatically before the RMs even walk into their morning meetings."*

*"**HedgeSPA** helps RMs monitor portfolio limits and client suitability, instead of the firm being surprised when the client calls days later."*

The HedgeSPA Solution

FAST

- Quick comparison of arrays of products against multiple portfolios
- Real-time limit monitoring giving RMs information instantly, not days later
- Reduced round-trip time from investment idea to execution, from days to hours

EFFECTIVE

- Customized independent analytics for each specific client
- Flexible information sharing makes interaction easier and more productive

ACCESSIBLE

- Powerful third-party analytics anytime, anywhere
- Secure mobile application facilitating efficient communication
- Complex portfolio calculations simplified with industry-proven graphical interface

SOPHISTICATED

- Institutional quality, tail-risk oriented investment analytics
- State-of-the-art portfolio optimization
- Powerful "What If" scenario analysis simulating possible portfolio performance

THEN	ACTION		NOW
Day 0 Relationship Manager (RM) receives information from Research and Product teams	**Day 0** Data→RM	**Day 0** Data→RM	**Day 0** Relationship Manager (RM) receives information from Research and Product teams
Day 1-3 RM manually compares individual bonds against Client portfolios to make product selections.	**Day 1-3** Product Selection	**Day 0 Afternoon** Product Selection	**That Afternoon** RM uses a web-based analytics tool to compare an entire set of bonds against all Client portfolios to make product selections.
Day 4-5 RM attempts to contact Client. Client receives the info, but has some concerns and wants to consider new scenarios.	**Day 4-5** Contact Client	**Day 1-2** Contact Client	**Day 1-2** RM provides portfolio analysis to Client and discusses with him on the phone.
Day 6-8 RM manually analyzes scenarios to address Client's concerns.	**Day 6-8** Address Concerns	**Day 2 Afternoon** Address Concerns Using Mobile Device	**Afternoon, Day 2** RM analyzes scenarios suggested by Client on the phone and sends them to Client's mobile device.
Day 9-10 RM attempts to contact Client again.	**Day 9-10** Contact Client		
Day 10 Big news occur in Europe and market moves as anticipated, but trade was never made.	**Day 10** Opportunity Missed	**Day 2 Afternoon** Decision and Transaction Made	**Later in that afternoon** Discussion is focused on making a decision for Client. Client is satisfied and makes the transaction by the end of the call.
Good News: Analysis was correct. **Bad News:** Market opportunity was missed.			**Result:** A profitable transaction. A satisfied Client.