With Great Wealth Comes Great Responsibility

– Bill Gates

WealthSPA

Sophisticated Predictive Analytics for Wealth Managers

Key Features

- Customizable extreme scenarios (tail-risk scenarios, also known as 'black swans') created by a recognized market research team that synthesizes consensus views from published economic and market research
- Estimate whether investors have sufficient assets to meet investment goals or future liabilities (e.g. retirement)
- Combine upside forward-looking economic views with low-probability 'black swan' scenarios, and rebalance asset weights to optimize betting ratios
- Reduce portfolio drawdowns by as much as 75% ahead of market storms, and increase betting ratios to as high as 68% from a typical range of 50s
- Break down forward-looking scenarios into break-even return for each asset or asset class, as one way to document and monitor the reasonableness of any investment decision
- Model and include higher-return illiquid investments in any multi-asset, multi-frequency portfolio
- Monitor and adjust temporary market exposures with (fundamental or statistical) factors and hedging tools until the next rebalancing cycle

Who Are We?

WealthSPA provides a cloud-based predictive analytics platform that protects portfolios advised by wealth managers, private banks and family offices against severe drawdowns, makes asset allocations under market scenarios and helps select winning assets in recovering markets.

How Can We Help?

Today, one urgent competitive advantage for wealth managers is backing their value propositions with sound analytics and documentation. Wealth managers need to document the reasonableness of their views in order to avoid regulatory scrutiny and minimize potential lawsuits from investors.

Our solution can generate robust recommendations by combining upside forward-looking economic views with low-probability 'black swan' scenarios. With the sophisticated analytics provided by our platform, wealth managers can perform sanity checks on investment ideas in real time, using consensus views from published research and/or views from in-house research teams.

WealthSPA is here to help you make better and more defensible decisions for your investors. We will strive to be your backbone, to ensure that your investors are satisfied and to maximize your success. Using our platform will protect your business, whilst saving you at least a couple of junior analyst headcounts and technology integration headaches, so you can focus on what you do best.

Where Do We Stand in the Playing Field?

Faster

- Algorithms with real-time performance, battle-tested parameters and heuristics, as opposed to overnight batch jobs and rigid parameters

More Affordable

- Virtualized deployment with flexible subscription and integration by stages vs. on-site deployment with benefits that are hard to realize before massive integration
- Easy to maintain Software-as-a-Service, as opposed to high-maintenance support from headcount-heavy technology teams

Better

- Native support for multi-asset, multi-frequency portfolios instead of making up data or worse, deleting useful data to enforce uniform data frequency

More Sophisticated

- Ready-for-deployment extreme risk models supported by our architecture vs. retrofitting them into clumsy legacy architectures as an 'after thought'
- Asset selection driven by forward-looking scenarios and factors vs. backward-looking asset selection models stating the obvious

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Forbes

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WealthSPA

Faster
- Automatically maintain records of product update emails from multiple brokers and distribution channels
- React to market changes before panicky investors call
- Reduce the time needed to choose the right products for the right clients in a recovering market

Better
- System monitors market performance and sends alerts
- Generate front, middle and back office reports
- Compare before vs after portfolios in extreme markets
- Send automatic email reports to your clients

More Affordable
- Accessible to wealth managers, private banks and family offices, even when you compete against top global asset managers
- Lower cost to implement and maintain

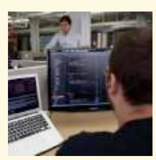
More Sophisticated
- Analyze historical and current market scenarios using expert-defined or customizable analytics
- Attribute historical and scenario returns to risk contributed by each asset
- Real-time, on-demand recalculations.

More **SATISFIED** investors!

More client referrals for wealth advisors to **GROW** their businesses

EASIER for stakeholders to serve investors!

Custodians
- Branding with superior analytics and front-end support
- Platform's good-faith valuations reduce investor pressure on custodians for month-end official reporting
- Custodians can focus on flawless back-end services



Integrators
- Reduce unnecessary, underappreciated manual tasks
- Higher quality, higher volumes of future engagements
- Minimize mistakes and corrections after acceptance

Integrators
Efficient data transfer and initial set-up

Historical trades, reconciled P&L entries

Comprehensive database and automated feed

Custodians
Automate daily transactions and focus on back-office support

Trade feeds, data feeds, mark-to-market

WealthSPA
- Efficient data consolidation
- Documented market research and scenarios
- Customizable analytics
- Automated performance monitoring
- Real-time alerts and updates

Automated alerts, timely recommendations

Automated reporting

Advisors
React to market changes and make impactful decisions

Emails, PDFs, mobile tools

Investors
More satisfied by well communicated and better investment recommendations