



statpro[®]
REVOLUTION
Analytics for the people

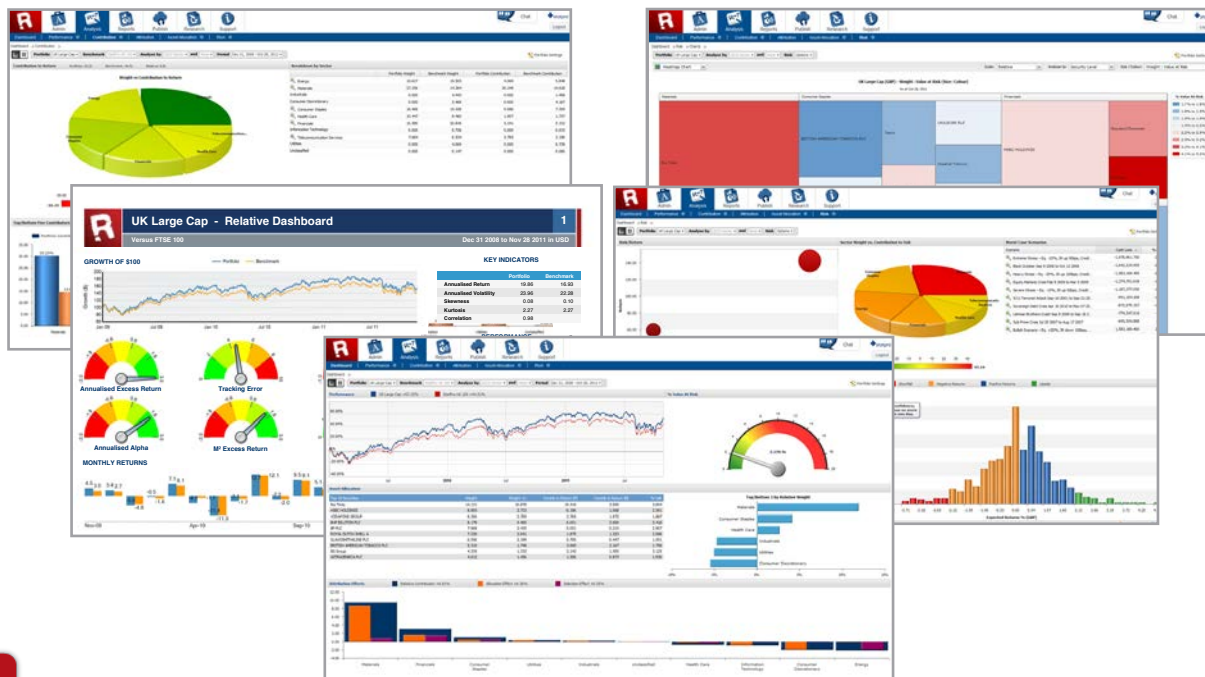
**Welcome to the Revolution:
beautiful analytical reporting**

www.statpro.com/revolution

The Revolution

Imagine a highly sophisticated portfolio analysis system, available anytime from any location, with simple and secure data management, online distribution and the ability to share portfolio performance results securely across your entire network. With superb visual analysis and beautiful reporting.

Stop imagining.



The Revolution



StatPro Revolution is a cloud-based portfolio analytics service that will:

- ☁ increase your sales by showing your investment strategy simply and beautifully
- ☁ reduce your costs by having all the information in one place
- ☁ transform your communication with clients by allowing them to see the reports you're working on easily
- ☁ and generally make your life easier by using cloud computing simply

Managing money is all about performance. Whether your clients want steady, low risk growth or massively leveraged, high risk growth, you have to explain to them how you are performing. Doing this has always been extremely complicated and expensive.

Now it is possible - welcome to the Revolution.



How it can help you?

StatPro Revolution is a cloud-based portfolio analytics service that combines sophisticated

- 📍 risk measurement
- 📍 performance analysis
- 📍 attribution analysis
- 📍 research
- 📍 reporting
- 📍 sharing

Delivered as Software as a Service (SaaS) StatPro Revolution gives you the support you need at a price you can afford.



Must see features

The Analysis

StatPro Revolution is the culmination of the breadth and depth of StatPro's incredible expertise in portfolio analytics and it gives it to you in a really beautiful and simple way.

Upload your holdings in Excel or CSV format and you're ready to go.

Show your performance in its best possible light with our dazzling dashboards. Explain how you've added value to the clients' portfolio, using contribution and attribution analysis.



Display your mastery of the investment process by highlighting the risks using stress test scenarios.



Must see features

The Reporting

Show your clients reports on the progress of their portfolio. Pick from a wide range of reports including allocation, contribution, absolute performance, equity overview, fixed income, regression analysis, risk and value at risk.



Simple, clear and useful information on the nature of the performance and risks of the portfolio. Your clients will love them.



Customize your reports too! Add your company's branding.

Must see features

Portfolio and market data: we've got it covered

Data management is difficult and expensive but StatPro Revolution provides all the market data you need. You provide the holdings in your portfolio and we will provide the rest.

StatPro Revolution covers global equities, global bonds, global mutual funds, most families of benchmarks, FX rates, sector classifications and much else besides. If we don't cover something, we have a custom asset facility that lets you put in your own assets.

StatPro has a secure FTP site to handle large amounts of data daily. It doesn't matter how many portfolios you have. Once the process is set up, StatPro Revolution looks for your files, loads and produces new portfolio analysis. It's that simple.



How it can help you?



The Fund Manager

Keep an eye on how your portfolio is doing. Could you be doing better? Perform “what if” analysis. Understand and manage your risks. Access your dashboards from wherever you are and show your clients how you are doing. Interact better with your clients and ask them to comment on your performance through the secure “social network”. Keeping in touch is so much easier.



The Sales Manager

Take StatPro Revolution on the road to increase your assets under management. Show clients the same dashboards you’re looking at. Show them what you’ve done with their funds in the reporting feature. Invite them online to see their portfolio’s performance with a secure log in. Demo why the portfolio has behaved in a certain way and show clients what went well and what didn’t and what you have done about it. You have nothing to hide right?



For new business, show prospects what you could do with their funds through attractive reports and simple to understand charts. Increase assets under management using StatPro Revolution.



How it can help you?



The Custodian and the Fund Administrator

You distinguish yourself from your competitors by the level of service you can offer your clients at the most competitive prices.

StatPro Revolution can provide your clients with the most sophisticated analysis available in the market with a zero IT footprint - that means zero IT costs for you to implement our service for your clients. That makes a big change from how things normally happen. No more projects that move at glacial speed. Hook in the client data and it will work. Now.



The Marketing Manager

Get to grips with the range of the funds you are marketing and figure out the best times to promote certain funds. Use StatPro Revolution's extensive analysis to explain your fund's virtues to investors. Produce multi-fund strategies to suit all tastes in investment strategies.



How it can help you?



The Performance Manager

At last you can provide real visibility for your team. Instead of providing endless PDF files that rarely get consulted, you can give everyone in your organisation the information they need to do their job properly.



Because it is interactive, StatPro Revolution can fulfill the needs of wildly different people within your company. Your key task is to make sure that the data is good and up to date and the comparisons relevant. Best of all you might finally get real appreciation for what you do.



The Risk Manager

Reduce stress by using the stress tests in StatPro Revolution on each portfolio. See in advance where the risks are, be they general market risk or liquidity risk or concentration risk. Share your insights with others to improve communication across the company.



How it can help you?

The Compliance Manager

You see what your colleagues see and through the user management system you can control what is done, and not done, according to regulation. Approve reports before they are published and control who sees what information. Help your business stay compliant and maximize sales.

The Authorized Corporate Director

Know how the Fund Manager is performing. Be confident that you're sticking to your legal obligations and management mandates. Monitor all the funds in your business easily and quickly.



The IT Manager

StatPro Revolution has a zero IT footprint. You know what that means - no hassle for you and at a time of tightening budgets, no hidden costs either. As for security, StatPro Revolution uses all the latest ideas on encryption so rest easy. Ask for our IT Security Manual for more details.



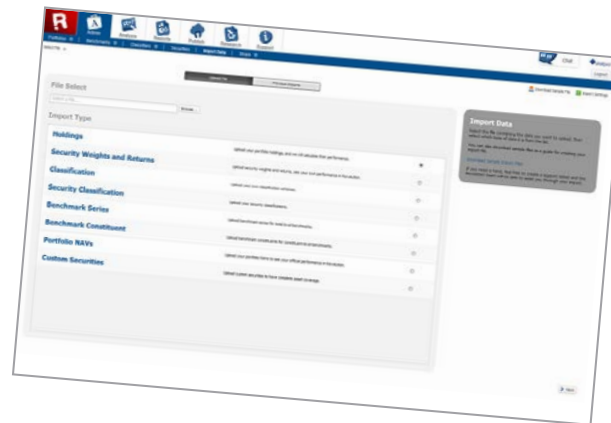
And the Finance Manager

This used to cost a fortune, but now you get performance, attribution, risk, reporting, publishing and much more for just \$100 per portfolio per month for 100 users (that's just \$1.00 a month per user!). More for less – now that's a real Revolution.



The Help Bit

Raise a ticket in our 24/7 support portal or for immediate response click “Chat”. Visit the forums in StatPro Revolution for helpful tips and hints or to request new features.



The Customization Bit

We all have little tweaks that make our portfolios unique. StatPro Revolution can handle custom securities, custom benchmarks and custom classifications. Get in touch through “Chat”.

The User Management Bit

Some companies need varying control. StatPro Revolution lets an administrator manage access. Give users different privileges by portfolio at the touch of a button.

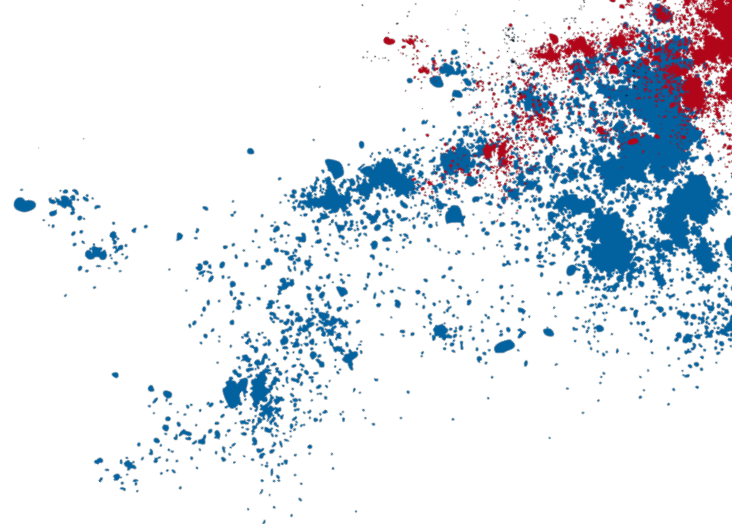


The cost

StatPro Revolution	PRO	PRIVATE WEALTH	ADVISOR	NAV ONLY
TARIFF	\$100	\$15	\$8	\$5
	per month	per month ⁽¹⁾	per month ⁽²⁾	per month ⁽³⁾
Global Equities	✓	✓	✓	✓
Global Bonds	✓	✓	✓	✓
Global Mutual Funds	✓	✓	✓	✓
ETFs	✓	✓	✓	✓
Currencies	✓	✓	✓	✓
Other Assets	✓	✓	✓	✓
Online Support	✓	✓	✓	✓
Unlimited Reporting	✓	✓	✓	✓
Total Return Benchmarks	✓	✓	✓	✓
Performance Analysis	✓	✓	✓	✓
Portfolio Statistics	✓	✓	✓	✓
Online Publishing	✓	✓	✓	✓
Ex-Ante Risk & Scenarios	✓	✓	✓	
Contribution Analysis	✓	✓	✓	
Absolute Attribution	✓	✓	✓	
Attribution Analysis	✓			
Detailed Benchmark ⁽⁴⁾	✓			
Assets per Portfolio Credit ⁽⁵⁾	200	25	10	1
User Access Limits ⁽⁶⁾	100	15	10	10

⁽¹⁾ Private Wealth portfolios only available in packs of 10
⁽²⁾ Advisor portfolios only available in packs of 25
⁽³⁾ Nav Only portfolios only available in packs of 50
⁽⁴⁾ Activated with associated provider license details
⁽⁵⁾ Additional securities can be added at the cost of an additional portfolio credit
⁽⁶⁾ Number of users you can share full portfolio access to within StatPro Revolution





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