

Making sense of people's financial futures

Company background

eValue FE provides market-leading stochastic modelling solutions to the financial services industry that integrate risk profiling and in-depth fund research with portfolio review and construction tools. As an independent thought leader in the field of financial planning and stochastic modelling, eValue FE solutions enable advisers and their clients to stay ahead of market trends and optimise long-term investment strategies. Its software solutions equip businesses with a uniquely effective means of communicating investment risk and reward.

eValue FE's heritage dates back to 1993 within global consultancy firm Towers Perrin, now Towers Watson. The eValue FE team has been creating financial planning solutions since the introduction of their first corporate retirement modeller. The tools enabled members of corporate Defined Benefit (DB) and Defined Contribution (DC) pension schemes to make informed choices about their pension decisions. From 2000, the stochastic engine was updated to provide a single platform to be used for all their clients, enabling multi-channel usage across both the corporate and retail markets.

With risk profiling and investment forecasting, eValue FE has grown to be the main provider of stochastic forecasting solutions over the last 10 years. Now over 80% of UK product providers and banks use eValue FE's services and over half of the adviser market have access to eValue FE's solutions.

The business operates on an independent basis as an associate company of FE (Financial Express), the leading financial data provider in the UK, which acquired eValue in early 2011 from the global risk management and HR consulting group Towers Watson, previously Tower Perrin. Strong relations remain in place between eValue FE and Towers Watson, with the same management team and eValue FE employees retained to drive the next stage of the company's development.



The marriage of eValue FE's financial planning and stochastic modelling and FE's data and analytical capabilities is a powerful combination, providing relevant and valuable solutions for clients. Closely integrating investor risk profiling, fund research and portfolio construction has enabled much richer propositions for our clients.

The eValue FE engine provides support for all types of financial calculations, from simple investments to retirement income drawdown and tax optimisation. The comprehensive functionality means that our solutions and tools are used widely across multiple channels covering financial planning and advice.

eValue FE's credentials

- **Originally part of Towers Watson (formerly Towers Perrin) and now an associated company of FE**
- **Nearly two decades of experience helping individuals understand investment risk reward trade-offs – longer than anyone else in the world**
- **Provides powerful analysis, financial planning, forecasting and reporting solutions for the financial services industry**
- **Well established track record of innovation and thought leadership**
- **Used by more than 80% of UK Financial Institutions and its software is accessed by over 50% of the adviser market**