Fincentric™

by **S&P Global**

See new opportunities through guided investing

Financial platforms can highlight new strategies to hedge or grow a portfolio, help keep goals on track, and empower investors to invest.

Evolving experiences

A disparity of knowledge and access has created investors who, while able to select investments, execute trades, and make other important and complicated decisions, still need guidance and support.

An increasing attraction to built-in investment guidance underscores the need to create better user experiences that interpret, analyze and understand a user's situations and needs.
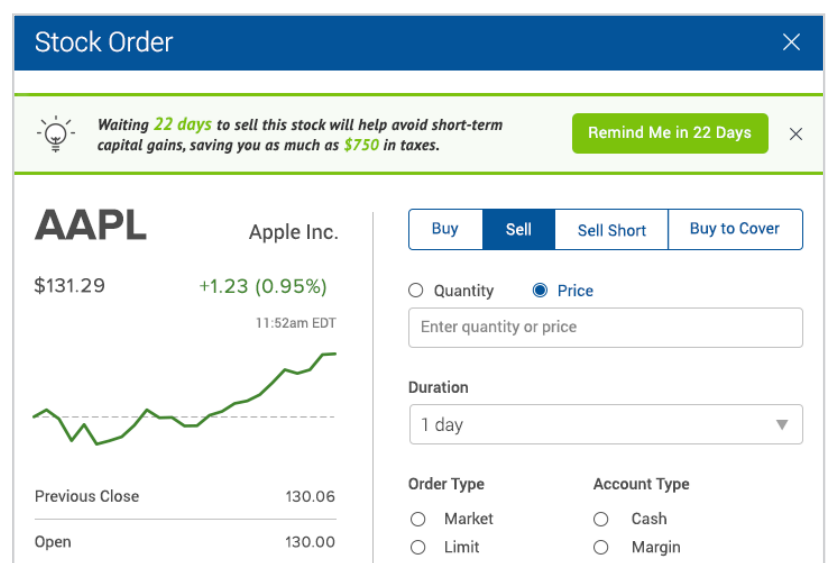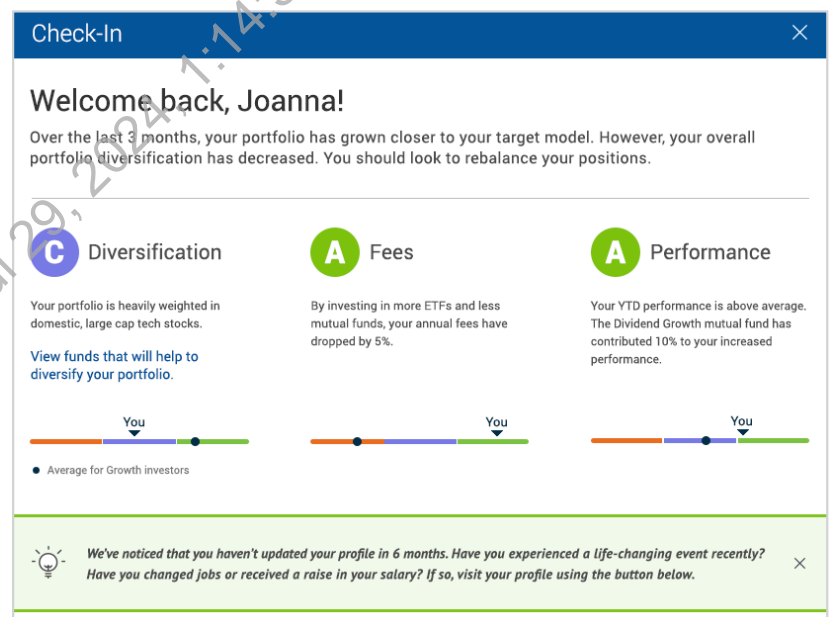
Benefits

Helps investors better monitor their portfolio progress

Proactively looks for ways to make changes as life situations evolve

Provides relevant actions to take
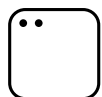
Builds trust with the client

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Examination and evaluation

Consistent analysis of client portfolios

Examination and evaluation of criteria across portfolios, keeping in mind growth vs. value strategies, risks, performance and fees

Forecasting

Monitoring potential opportunity and risk

Forecasting when to trade with lower fees

Providing tax planning insights

Autopilot investing

Portfolio reviews with goals in mind

Recommended realignment to target models when applicable

Market and company research

Creating investment strategies for individuals

Incorporating seasonal advice

Automatic quarterly updates

Automated time-based reviews that assess portfolio strategy and life changes

Recommended actionable advice

Investment opportunity insights

Comparisons of client portfolios to similar investor strategies with ratings and rankings

Goal planning strategies

Establishing individual investment goals

Providing user-centric setups

Allowing goal revision at any time

Proactively monitoring goals with notifications

Accessibility

Actively and passively monitoring portfolios

Providing effortless onboarding processes

Accessibility to individuals with varying amounts of assets