BRIDGE

MPS Research & Oversight Platform

MVP Build Summary

Prepared by Shivang Chaudhary
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Status: MVP Complete: Ready for Review

Executive Summary

This is a working MVP of Bridge covering all three core modules from the product specification. The platform allows adviser firms to filter the MPS universe, access structured analytical dashboards for each provider, and read supporting research and commentary, all within a single application.

The MVP validates the analytical framework in software and demonstrates the end-to-end user journey: from filtering the universe, to deep-diving a provider, to reading supporting research. It is a foundation to build on, not a finished product.

What Has Been Built

Module A – MPS Selection

A filterable interface across the full MPS provider universe. Advisers can narrow down relevant solutions before deeper analysis.

Feature	Detail
Coverage	17 portfolios across 5 providers (Vanguard, 7IM, Tatton, EQ Investors, Parmenion)
Filters	Platform, provider, risk rating range (1–10), ESG/ethical preference
Data shown	Asset allocation bars, OCF, 1yr/3yr/5yr returns, volatility, Sharpe ratio, platform availability
Platforms	Transact, Fundment, Quilter, Aegon, abrdn, Parmenion

Maps to spec: *Section 4A – MPS Selection*

Module B – MPS Analysis

Structured analytical dashboards for each approved provider, with multiple analysis tabs and drill-down into individual portfolios.

- **Provider dashboards** with interactive charts (asset allocation, risk vs return scatter), portfolio range tables, and aggregate analytics
- **Strengths & considerations** for each provider, clearly articulated as per the spec requirement
- **Individual MPS detail pages** with 36-month performance history, asset and geographic allocation breakdowns, underlying fund holdings, and peer comparison against same-risk portfolios
- **Key personnel** listed for each provider
- **Peer comparison tables** at each risk level to support selection decisions

Maps to spec: *Section 4B – MPS Analysis (interactive charts, data tables, written commentary, strengths and considerations)*

Module C – Insights

A content section with market commentary, regulatory analysis, and thematic thought pieces. Filterable by category.

Content Type	Example
Weekly Commentary	Weekly Market Update covering equity/bond movements, MPS portfolio implications
Regulatory	Consumer Duty One Year On – practical guidance on MPS oversight obligations
Thematic Analysis	Passive vs Active MPS framework; MPS rebalancing frequency analysis
Market Review	Q4 2025 MPS Market Review across the provider universe

Maps to spec: *Section 4C – Insights (weekly commentary, thought pieces, thematic analysis)*

Dashboard

A central overview tying the three modules together: aggregate market stats, provider summary table, risk distribution chart, and links to the latest insights. Serves as the entry point to the platform.

What Is Intentionally Deferred

The following items from the product spec are acknowledged but intentionally deferred from the MVP:

Phase 2 – Strengthening & Scaling

- **Automated data ingestion** – data is currently static/illustrative, mirroring the manual approach described in the spec but in a more structured format
- **Platform rebuild for scale** – database layer, cleaner internal structure, improved scalability
- **UX refinements** – further responsive design, navigation polish, visual presentation improvements

Phase 3 – Expansion & Advanced Features

- **AI-enhanced commentary** – AI-generated summaries, "Explain this chart" functionality, customisable regulatory reports
- **Communication layer** – integrated messaging between advisers, Bridge, and MPS providers
- **Portfolio change tracking** – AI analysis of allocation changes over time, automated alerts
- **Downloadable PDF reports** – audit-ready documents for regulatory compliance
- **User authentication & multi-tenancy** – firm-wide licensing, subscription management, user roles
- **Subscription alerts** – notifications when subscribed providers publish updates or make portfolio changes

What This Proves

1. **The analytical framework works in software.** The three-module structure from the spec holds up in practice and delivers a coherent user experience.
2. **The end-to-end user journey is functional.** An adviser can go from filtering the universe, to deep-diving a provider, to reviewing underlying holdings, to reading supporting research, all in one platform.
3. **The data model supports the vision.** Provider metadata, portfolio analytics, performance history, peer comparison, geographic allocation, and underlying fund data are all structured and extensible.
4. **The content layer adds tangible value.** Insights demonstrate the type of independent research that differentiates Bridge from provider-produced material.

Technical Summary

Component	Detail
Backend	FastAPI (Python) with RESTful API endpoints
Frontend	Single-page application with Chart.js for interactive visualisations
Data	17 MPS portfolios, 5 providers, 8 platforms, 5 research articles
API endpoints	10 endpoints covering dashboard, selection, analysis, insights, and comparison
Deployment	Single command: python main.py → runs on localhost:8000
Codebase	5 files, lightweight and extensible

Bridge MVP – Built and ready for review.