

⚠️ DEMONSTRATION REPORT - SYNTHETIC DATA

This report was generated using synthetic example data for demonstration purposes only. All figures, metrics, and insights are illustrative and do not represent any real company or actual business performance.

January 14, 2026

Client Intelligence Report - Clean Metrics Studio

Client Intelligence Report

Sterling Capital Partners - Client Segmentation & Lifetime Value Analysis | FY 2025

Client Overview

45,000

ACTIVE CLIENTS

£1,567

AVG FEE LTV

52.4%

TOP 10% FEE SHARE

7.7yrs

AVG CLIENT TENURE

Client Segment Deep-Dive

Segment	Clients	Trade Volume	Fee Revenue	Avg Portfolio	NPS
Affluent	9,058	£13.72B	£30.83M	£300,709	8.6
	3,601	£9.00B	£19.35M	£2,737,750	8.6

High Net Worth					
Mass Affluent	13,552	£4.81B	£11.65M	£62,481	8.6
Core Retail	14,231	£2.51B	£7.32M	£14,952	8.6
Entry Level	4,556	£0.32B	£1.36M	£2,767	8.6

Segment Intelligence

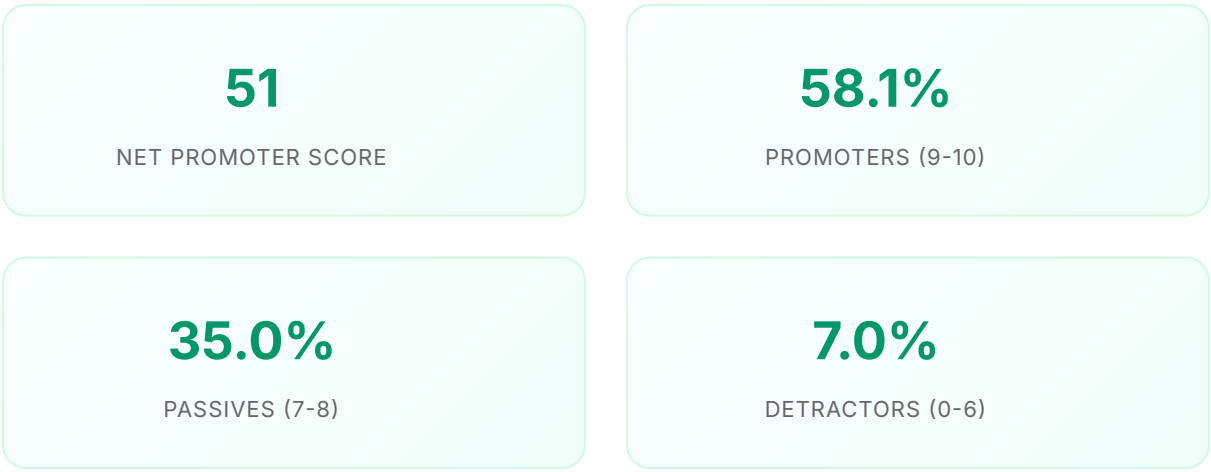
- **HNW Concentration:** High Net Worth (8% of clients) generates 27% of fee revenue
- **Affluent Core:** Affluent segment represents optimal growth opportunity with strong engagement
- **Mass Affluent Pipeline:** 30% of base - nurture to Affluent tier through education and tools
- **Entry Level Conversion:** Focus on converting 10% entry level to active traders

Geographic Client Distribution

Country	Clients	Trade Volume	Fee Revenue	Vol/Client
United Kingdom	20,371	£13.78B	£6.03M	£676,687
Germany	5,307	£3.53B	£13.79M	£664,705
France	3,674	£2.51B	£9.77M	£683,998
Netherlands	2,701	£1.83B	£7.13M	£678,054
Ireland	2,222	£1.46B	£5.67M	£659,129
Italy	1,808	£1.26B	£4.88M	£694,152

Spain	1,798	£1.20B	£4.65M	£670,108
Switzerland	1,780	£1.16B	£4.54M	£650,103
Belgium	1,392	£0.94B	£3.65M	£671,875
Sweden	1,294	£0.89B	£3.47M	£687,052

Client Satisfaction Analysis



Acquisition Channel Analysis

Channel	Trade Volume	Trades	Fee Revenue	Clients
Organic Search	£6.67B	131,866	£15.56M	40,964
Referral Program	£5.47B	107,469	£12.80M	38,980
Paid Search	£4.52B	89,733	£10.53M	36,823
Financial Press	£3.64B	71,473	£8.47M	33,887
Social Media	£3.06B	59,750	£6.99M	31,417
Comparison Site	£2.44B	47,988	£5.58M	28,115

IFA/Wealth Manager	£2.41B	47,857	£5.57M	28,014
Direct	£2.14B	41,934	£4.99M	25,959

Acquisition Insights

- **Organic Strength:** 22% from organic search - SEO investment paying dividends
- **Referral Power:** 18% via referral - expand refer-a-friend programme
- **IFA Channel:** 8% from wealth managers - highest avg portfolio values
- **Social Emerging:** 10% from social media - younger demographic entry point

Client Classification: All clients appropriately classified under MiFID II requirements. Retail clients receive enhanced protections. Professional client assessments conducted annually. FSCS protection applies to eligible claimants.