

⚠ DEMONSTRATION REPORT - SYNTHETIC DATA

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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

Segment	Clients	Trade Volume	Fee Revenue	Avg Rev/Cust
Mass Affluent	13,552	£4.81B	£11.65M	£62,481
Core Retail	14,231	£2.51B	£7.32M	£14,952
Entry Level	4,556	£0.32B	£1.36M	£2,767

Segment Intelligence

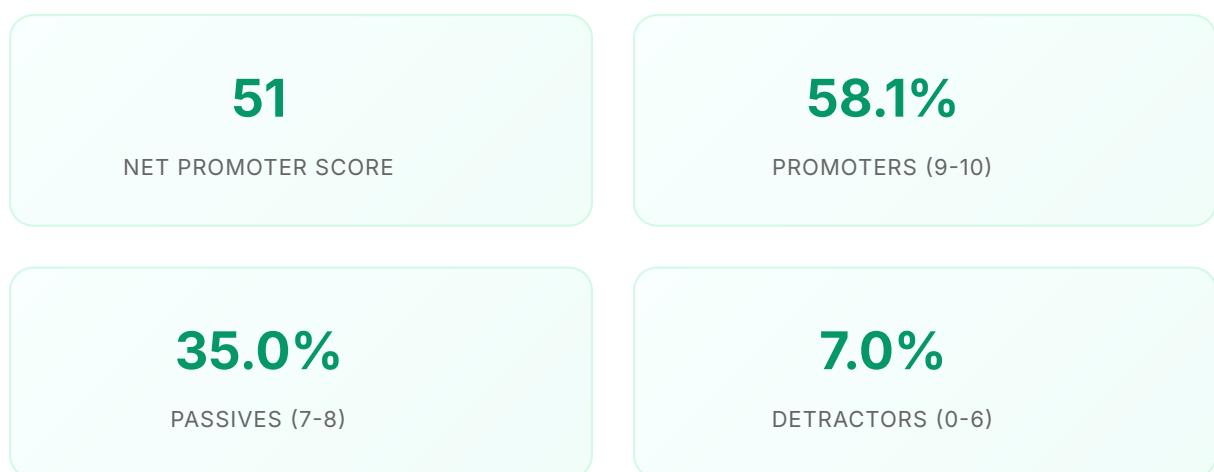
- HNW Concentration:** High Net Worth (8% of clients) generates 27% of fee revenue
- Affluent Core:** Affluent segment represents optimal growth opportunity with strong engagement
- Mass Affluent Pipeline:** 30% of base - nurture to Affluent tier through education and tools
- Entry Level Conversion:**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

Country	Clients	Trade Volume	Fee Revenue	Total Assets
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.

Report prepared by **Clean Metrics Studio** | January 2026

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