



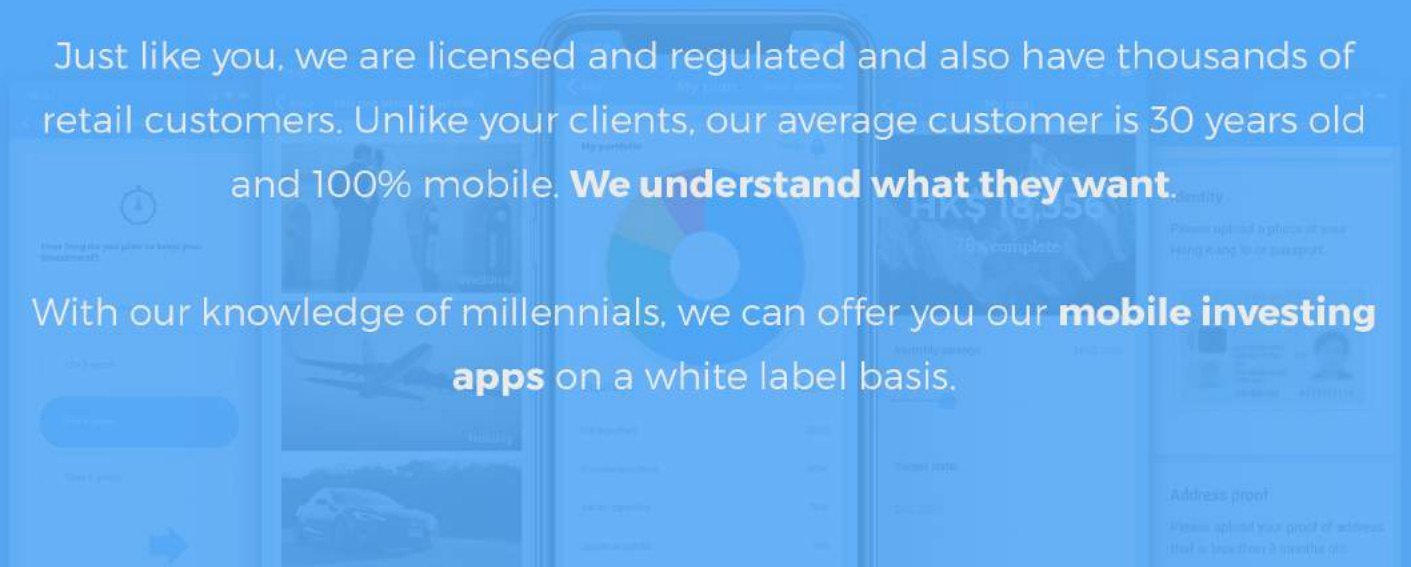
A complete robo-advisor solution for your business

It's time to get ready for the next generation of wealth.

You are a major bank, broker or asset manager and you are facing the universal issue of an ageing customer base. If you are not mobile, simple and affordable, **young customers are out of reach.**

Just like you, we are licensed and regulated and also have thousands of retail customers. Unlike your clients, our average customer is 30 years old and 100% mobile. **We understand what they want.**

With our knowledge of millennials, we can offer you our **mobile investing apps** on a white label basis.



Customised solution

- 1 Multi-asset class, currency and language
- 2 Adapted to your markets with specific products e.g. mutual funds, ETFs & stocks
- 3 Customizable portfolio strategy, rebalancing algorithms and customer account opening
- 4 Past experience with big institutions, currently building investing solutions for Nomura

Any user interface with total customization

Any geography, currency and language

Any asset class. Mutual funds, ETFs, stocks, etc.

Integrated advisor and service support



iOS, Android and web apps

Auto scales based on usage

Private, managed or hybrid infrastructure

Integration through flexible API



Global

Our robo-advisor platform is multi-market, multi-currency, multi-asset class, multi-lingual and multi-regulatory. Any geography is possible. We can help you deploy your robo-advisor on iOS, Android, Windows mobile or a web application.



Modular

We utilize a modular card system for all product features. Every card can be enabled or disabled based on your own customer requirements. We can support front, middle and back-office as well as execution and custody of the portfolios.



Open APIs

We can configure your mobile and web apps or you can build your own on our back-end APIs. Our apps use the same public APIs as most cloud services. We can integrate with and “internationalize” any third-party technology.



Flexible infrastructure

Our APIs are built on top of microservices that are platform and cloud agnostic. We can deploy our APIs on your private infrastructure or we can host the entire platform for you. You can even have a hybrid solution.



PAAS for scalability

PAAS (platform as a service) enables a lot of simple out of the box functionalities such as distributed microservices and auto-scaling. We can support any number of businesses and configurations running on our platform simultaneously.



Experienced team

The development and tech operations team has deep experience in building and deploying white label wealth management and brokerage solutions. Our UX team can support any interface design.

Fully customized for your customers and organization



Agile apps

Fully customized user experience

Flexible strategies

Dynamic portfolio strategies and rebalancing algorithms

Any asset class

Unlimited portfolios constructed with any asset class including funds, ETFs, stocks, etc

Customer on boarding

Built around your risk profiling, account opening, compliance and work flow processes

Deploy to any geography

Any market, product, currency or language



An aerial view of a dense city skyline, likely Hong Kong, with a blue overlay. The image shows numerous high-rise buildings and a harbor in the background. The text is overlaid on the image.

Let's talk.

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