



Fund Dashboard

Excite and Inform investors about your funds.



Boost sales by empowering sales team with an innovative tool



Demonstrate the investment wisdom of your fund manager



Interact with your investors in a way your competition can't

Fund Dashboard

Excite and Inform investors about your funds.



YOUR BENEFITS

Higher NPS with "a Digital Factsheet"

Leave your investors with an interactive tool instead of "old school presentations"

More Touchpoints through Interaction

Learn how investors interact with your fund. Find out which KPIs investors are looking for

Boost Conversion by reinventing Sales Presentations

Deliver your investors a unique experience.



Fund Breakdown



Asset Class Performance



Fund Manager Comments



Study time periods



Increase Transparency



Reinforce Sales Pitch

INCREASE SALES BY INCREASING TRANSPARENCY

Get the investors' attention towards your performance highlights



Show diversification by providing a full breakdown of the fund



Provide investors with a clear understanding of costs



HOW TO USE FINCITE.CORE ...

Allocate

Core.Allocate builds client profiles, suggests allocations and products on banks' allocations and product galaxy

Analyse

Core.Analyse applies financial mathematics and investment rules on the client's portfolio

... FOR YOUR OWN APPLICATION

Individual Look & Feel

Build your own frontend based on our software

Fast Go To Market

In just 3 months to your individual MVP solution

Compliant with Data Protection

We do not store personal identifiers and are compliant with latest data protection regulation