



AMaaS: the future of asset management

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“ The next phase in the evolution of asset management will see investment companies evolve from providing asset management as a product to offering asset management as a service (**AMaaS**).

Asset managers and advisers who do not develop the capabilities, tools, and skills will be disrupted and disappear. ”

Beyond Active and Passive Investing: The Customisation of Finance, 2024

Marc Reinganum, CEO **Compitium**, ex **SSGA**, **Main Street**, **Oppenheimer**

Kenneth Blay, Head of Research for Global Thought Leadership **Invesco**, ex **State Street**, **1st Global**

CFA Institute Research Foundation

Solid AMaaS

Quality

Global coverage

Multi-asset class

Fully automated

Ultra-scalable

API & web & mobile

Hyper-customisable

Professional methodologies

Intuitive for the user

Speed

Seconds to operate

Days to integrate

Multi-channel

Info updated daily

Price

Affordable to every
firm and client

120 000+

stocks, bonds, ETFs, FX

7+ trillion

portfolios

50+

factors

Research & risk
management

Portfolio
construction

Portfolio
optimisation

1 min

1 bp

Your new **superpowers**

24/7 research and risk management in 1 click In-house ETF creation Instant portfolio construction

Hundreds of model portfolios Pre-trade risk warnings New market segments & clients

Regular rebalancing recommendations Expanded EAM Hyper-customised approach

Automatic mandate alerting Instant instrument and portfolio reports Daily portfolio monitoring

Cross-asset comparison Full investment decision-making cycle Automated portfolio optimisation

Hundreds of personalised trade ideas for every client Unbiased & comprehensive information

AMaaS is the greatest **opportunity** for
asset managers

+70% revenue and **-40%** costs

AMaaS is the greatest **threat** for
asset managers

Technology is easily transferrable

... are **new** asset managers

Brokers

Neobrokers

Banks

Neobanks

Exchanges

Insurance companies

[Insert name here]

... are **new** asset managers

Asset management = client base + AMaaS + DMA

Contacts

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