












PERFORMATIV

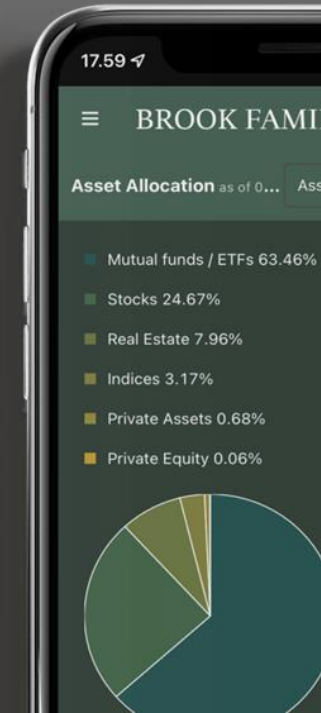
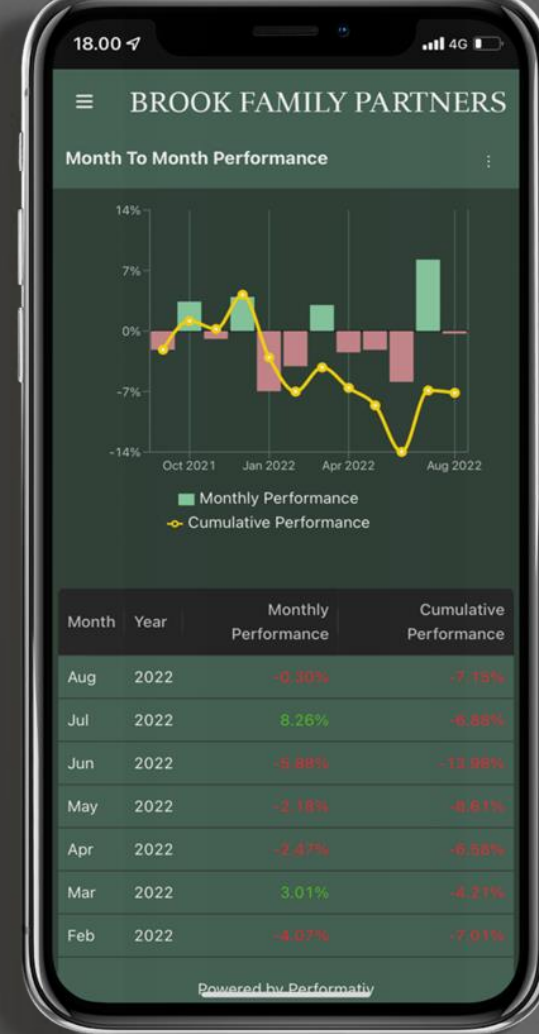
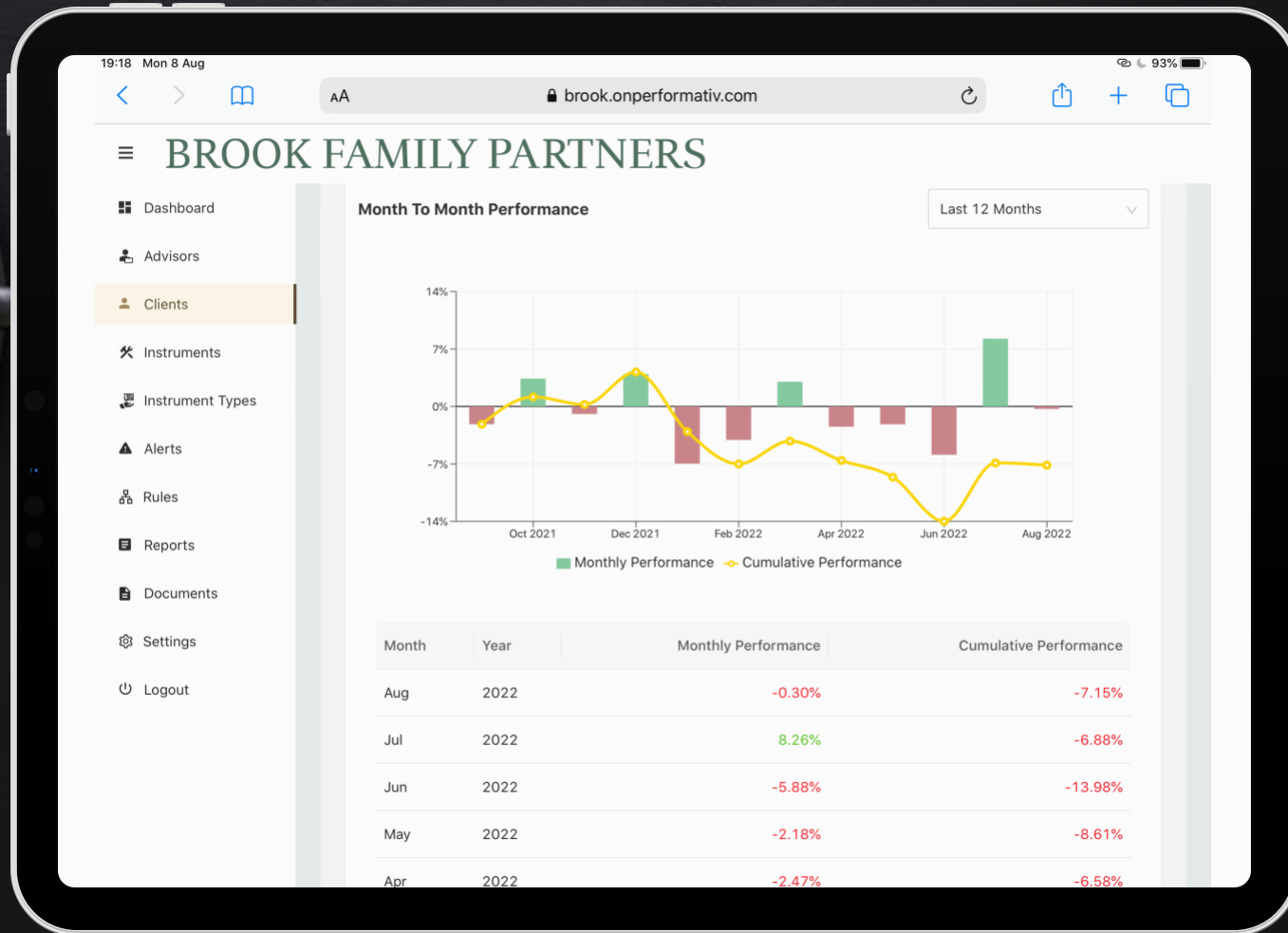
Fit for the Future

The wealth management sector is on a digitisation journey however in many cases the available tech is not sufficient

Our platform meets the digitisation needs of Wealth managers and their clients

	SaaS wealth management platform	→	No IT implementation
	Multi custodian (with 400+ custodians connected)	→	No more cleaning of custodian data
	Includes Non-bankable assets	→	Advisors and their clients see total portfolio
	Latest Tech (native cloud using micro-services)	→	Speed, we revalue all portfolios in seconds
	White-labelled Appstore app for clients	→	Customer satisfaction significantly boosted
	Powerful (easy to use) browser app for advisors	→	No need to contact us to make changes
	Open API connection	→	Send or receive data from 3rd party - Salesforce, Matter, Bloomberg...
	Global Market Data license	→	We provide daily update of positions
	Low cost of ownership	→	The icing on the cake!

...and is delivered through 2 powerful whitelabelled apps – a browser accessed ‘advisor’ app and an Appstore downloadable client app



We offer powerful browser accessed app allowing advisors to monitor, alert and act...

... and an intuitive app for your clients to see their complete portfolio.

Advisors

Access all portfolios' metrics

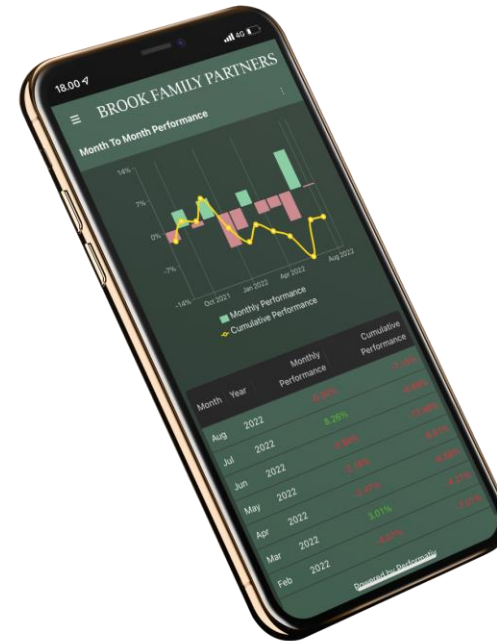
Modify holdings/pricing of NBA

Export reports to FSA or MS Excel

Set a fee structure for each client

Onboard new clients

Integration with 3rd party systems/KYC/
ESG reporting, etc.



Clients

Appstore white labelled app

Monitor returns & risk

Visualize liquidity

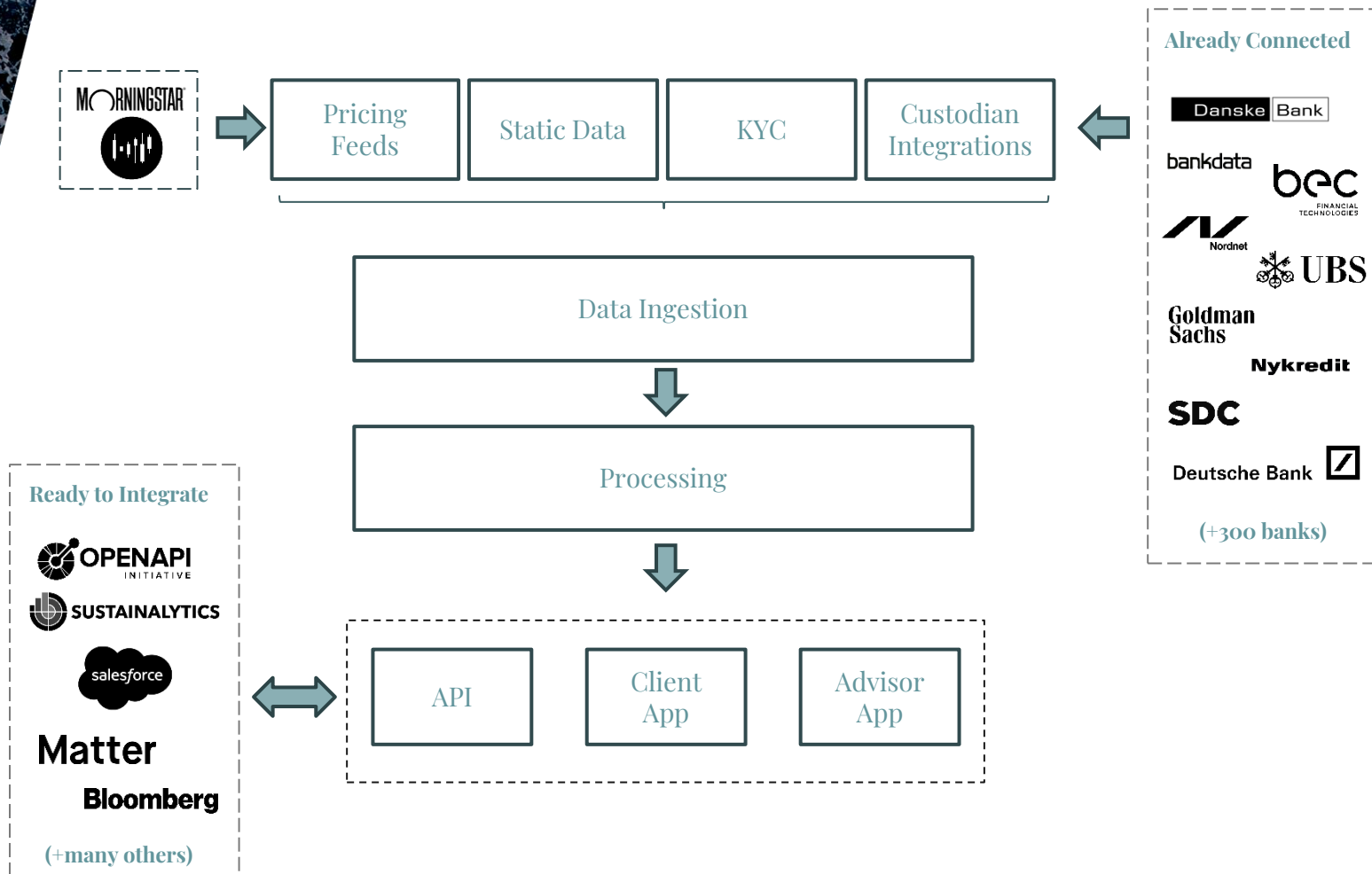
View asset allocation

See total portfolio including NBA

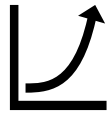
Valuable set of analytics for the client

The technology is native cloud micro service, market leading and allows for unrivalled speed, privacy and scalability

Our system ingests, cleans and combines data, and presents the data through our advisor and client apps



A business case for Performativ can be built around any of our 3 Value Proposition pillars...



Enhance scalability

Our technology allows you to scale your business – in line with wealth sector growth



Product Improvement

Our client app meets the digital needs of your clients, and our powerful advisor app facilitates regular ‘up to date’ discussions



Operational efficiency

Using Performativ can free up hundreds of man hours of operational cost

...as experienced by our existing customers:

"Excel became unmanageable after 5 clients and Performativ solved that"

"For us, Performativ is a swiss-army knife that allows us to generate excess revenue, provide better feedback and deliver an improved product" Nordic Investment advisor

"After our partnership with Performativ, we've lessened churn, improved customer satisfaction and saved costs." – Danish Family Office



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