Services and Features

Overview / Context:

What We Do	What We Do *NOT* Do
✓ Help you determine how you/your clients can optimally navigate to your desired investment destination.	✗ We are not a middle-office solution that puts YOUR data together to provide a holistic view of current investment positions/exposure and reporting.
✓ Satnav for investing decisions (especially asset allocation) as opposed to description of history or where you are now.	✗ However, we consider that client portfolio data aggregation is also an important problem to solve and we are happy to see many credible solutions now come to the market.
✓ Provide clients (investment teams, advisors) with easy-to-access, forward-looking, real-time actionable insights to _augment_ their decision-making.	✗ In fact, ClearMacro considers the information from those tools as a potential input (i.e. starting reference exposures) to our portfolio diagnostics modules (which helps identify potential portfolio opportunities).
✓ Improve investment performance by mitigating cognitive biases and covering more opportunities as well as build client confidence by more transparent, consistent, and comprehensive elements underpinning decision making.	✗ As such, we do not connect to clients' OMS systems given that our insights are typically combined with other inhouse views to generate the final investment decisions at the client.
✓ Cover all major public asset classes and high-level mapping to private asset classes. Cover most investible geographies.	✗ We do not focus on short-term trading (< 1 month). For example, we do not support intraday trading.
✓ Focus on investing timeframes from 1 month right out to 10 years.	✗ We do not focus on individual issuer instruments – e.g. single stocks (we generally stop at sector level).
✓ Source, ingest and process a range of external datasets to power the ClearMacro engine without our client needing to be involved.	✗ We do not rely on clients' own data to generate the ClearMacro outputs but we can incorporate.

Portfolio Design:

- Strategic asset allocation and portfolio optimisation
- Tactical/Dynamic asset allocation and overlays
- Investment process design and planning
- Private asset proxy modelling
- Manage and construct live and model portfolios at scale.
- Global, multi-currency portfolios
- Portfolio monitoring of realised versus objectives and prior expectations.
- Automatic portfolio rebalancing with advanced change filtering
- Performance & risk projections, historical analysis
- Historical back-testing of portfolio and process design

Portfolio Communication:

- Investment Committee decks/materials
- Forward-looking portfolio interpretation & narratives
- White-labelled dynamic dashboards and reports for internal or external stakeholders

Asset Insights:

Macroeconomic Signals	Return Forecasts	Economic Indicator Nowcasts
Key Facts:	**Key Facts:**	**Key Facts:**
• 6000+ Signals updated daily.	• 5400+ Forecasts updated daily.	• Daily updated nowcasts for GDP, CLI and CPI
• All major asset classes, countries, regions, currencies, commodities, and sectors.	• All major asset classes, countries, regions, currencies, commodities, and sectors.	• ## Countries
• Built from a variety of traditional and alternative data sources.	• Covering horizons from 1 month to 10 Years.	• Cutting edge machine learning models.
• Transparently built with full online documentation available.	• Multiple frameworks including both traditional models and machine learning.	• Testable historic predictions with long history.
	• Transparently built and explainable with long history.	
Delivery:	**Delivery:**	**Delivery:**
• Custom dashboards	• Custom dashboards	• Custom dashboards
• Interactive Explorer	• Interactive Explorer	• Daily Report
• Self-service API	• Excel Export	
Customers who use this:	**Customers who use this:**	**Customers who use this:**
• Major/brand-name Hedge Funds (some restrictions on releasing names)	• Key input to Portfolio tools for Multi-Family Offices and Wealth clients	• Currently being trialled by customers
• Nissay Asset Management	• Currently being trialled by customers	