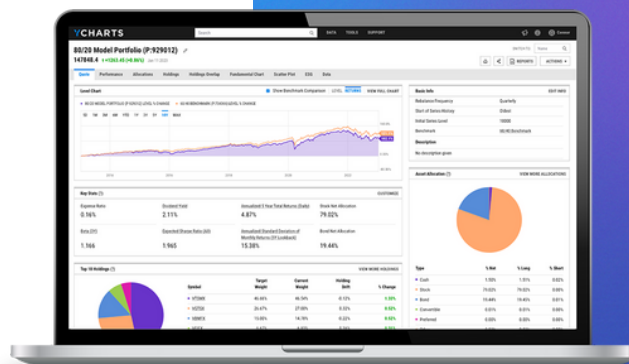# YCHARTS

Your End-to-End Growth Engine

More than just research and charts, the YCharts platform combines powerful analytics, intuitive design, and automated workflows to help advisors work smarter, grow faster, and deliver more value to clients.

A Full Suite of Essential Tools for Modern Advisors

Proposal Generation & Client Communication

- Intuitive drag-and-drop report builder with 30+ customizable modules
- Dynamic presentation templates that update automatically
- Branded, compliance-ready materials in minutes
- Easy-to-understand visuals that align with clients' goals

Portfolio Analysis & Construction

- Test and validate investment strategies across 4,000+ metrics
- Compare performance, risk, and holdings in a single view
- Build optimal allocations based on client goals
- Model client-specific contribution and withdrawal plans across their financial journey.

Research & Due Diligence

- Screen and compare 45,000+ mutual funds and ETFs
- Filter 20,000+ stocks using 4,500+ metrics
- Create custom scoring models
- Generate investment ideas aligned with clients' risk profiles

Automated Workflows

- Share dashboards, models and benchmarks across your team
- Save hours with pre-built Excel templates
- Schedule customized market updates
- Turn complex analysis into one-click actions

The YCharts Advantage

➡️ **Seamless Integration**
   All solutions work together in a single, intuitive platform designed for advisor efficiency.

➡️ **Built for Growth**
   Generate compelling visuals and reports that help win and retain business.

➡️ **Time-Saving Automation**
   Transform hours of manual work into minutes of automated precision.

➡️ **Client-Ready Insights**
   Turn complex data into clear, actionable recommendations.

On Average, YCharts Users:

Saved **20 hours**/month compared to prior or no technology

Generated **$33 million** of new AUM per year

Source: 2024 YCharts Client Survey

YCHARTS

Ready to see how YCharts can help you transform growth and efficiency?

Scan the QR code to start your free trial today.