

See What YCHARTS Can Do for You

Professional	Presenter	Analyst
1st Seat: \$6,300 Additional Seats: \$3,600	Additional Seats: \$2,400	1st Seat: \$3,000 Additional Seats: \$1,500
Best for: Portfolio Construction Research & Analysis Proposal Generation Market Monitoring & Sharing Tailored Client Reports	Best for: Meeting Prep Scalable AUM Growth Client Relationship Management Shared Proposals & Reports Market Monitoring	Best for: Research & Analysis Market Monitoring Evaluating Securities Idea Generation Team Collaboration
All Presenter & Analyst features plus: ✓ Report Builder & Talking Points ✓ Portfolio Optimizer ✓ Quick Extract ✓ Scenarios ✓ Interactive Analysis ✓ Transition Tax Analysis ✓ Custom Securities & Benchmarks ✓ Excel Add-in & Integration Support ✓ Managed Research Lists ✓ Proprietary Strategy Oversight & Team Sharing Capabilities ✓ Compliance Controls ✓ Dedicated Support	Features include: ✓ Firm-Branded Proposals & Reports ✓ Custom Disclosures ✓ Model Portfolios ✓ Custom Alerts ✓ Shared Dashboards, Charts & Watchlists ✓ Custodian Integrations ✓ Quickflows ✓ Equities, Funds & Indices Data ✓ Economic Datasets ✓ Live Support Chat	Features include: ✓ Charting Capabilities & Scatter Plot ✓ Stock & Fund Screeners ✓ Comp Tables & Timeseries Analysis ✓ Custom Dashboards, Watchlists & Alerts ✓ Quickflows ✓ Equities & Indices Data ✓ Economic, Sector & Crypto Datasets ✓ Live Support Chat
Y, our AI agent, is included on every YCharts subscription.		

Enhancements		
NEW  Risk & Proposal Manager ✓ Risk Tolerance Questionnaire ✓ Risk Profiles ✓ Book of Business Dashboard ✓ Firm-Level Oversight	SMA Data	\$1,200
	Enhanced Fund Data	\$600
	Bond Data	\$600
	Bond Ratings Data	\$600
	Alternatives Data	\$600
	CapGainsValet	\$300
		\$1,200