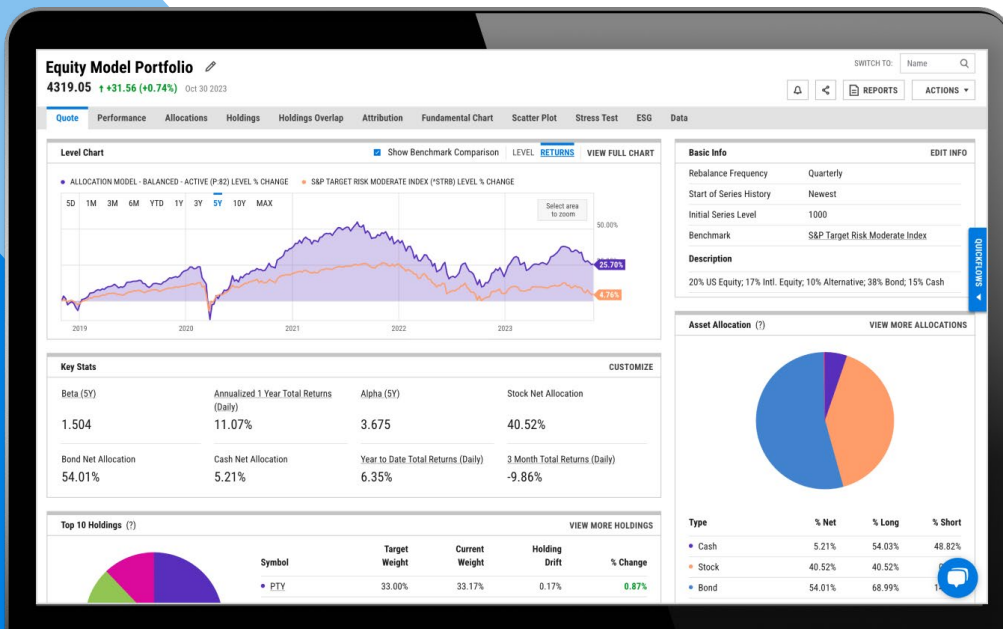# YCHARTS

Top Features

Enabling smarter investment decisions & better client communications for advisors

As advisors and planners seek to differentiate themselves and effectively communicate their value proposition, creating repeatable, scalable processes for AUM growth can be a challenge. YCharts delivers by streamlining and automating investment research, helping to quickly generate strategic insights, and enabling advisors to achieve more growth in less time.
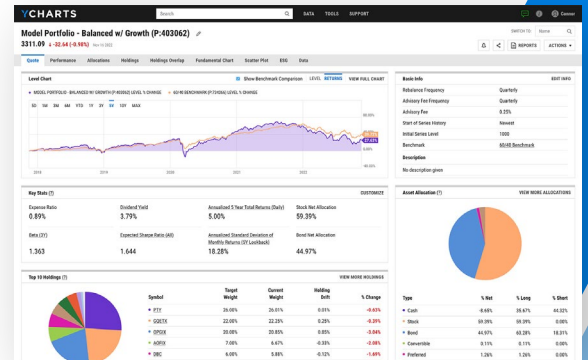
Book a Demo

1 Build, Analyze & Manage Portfolios

- Manage proprietary models & custom blended benchmarks

- Compare recommended strategies against a prospect's current portfolio

- Generate key insights on strategies with YCharts' comprehensive tools and capabilities

- Demonstrate your Alpha and tactical shifts with historical allocation changes

- Import portfolio holdings from any of YCharts' integration partners (or upload .csv or .xlsx files) to compare against your proposed strategy

→ *Learn more about **Model Portfolios***

2 Generate Compelling Visuals & Insights

- Answer questions on the fly with dynamic charting & other visuals

- Visualize the risk vs. reward relationship for portfolios and securities

- Plot an efficient frontier to illustrate how prospect portfolios compare to your own
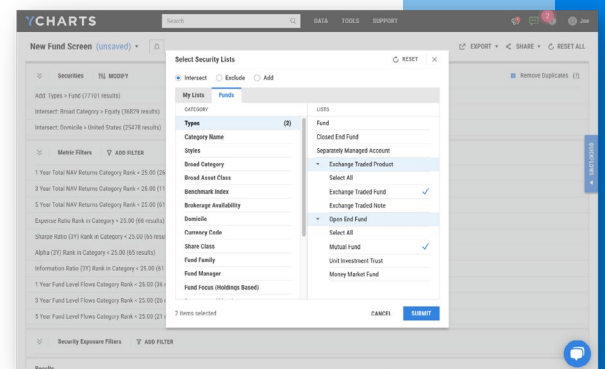
- Jumpstart your research with prebuilt templates

→ *Learn more about **Fundamental Charts** & **Scatter Plot***

3 Screen for Stocks, ETFs & Mutual Funds

- Filter over 25k+ equities and 80k+ funds using any combination of 4,500 quantitative and qualitative metrics

- Save Screener results as Watchlists for continued monitoring and analysis

- Get updates whenever a security enters or exits your screen criteria

→ *Learn more about the **Stock** & **Fund Screener***

YCHARTS

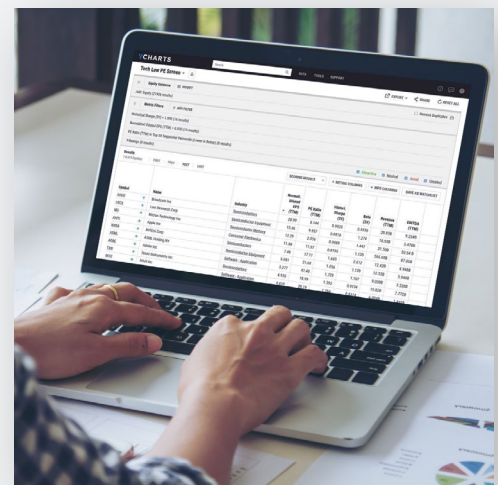## 4 — Compare Portfolios & Any Security Type

- Pit model strategies head-to-head to drive engaging conversations
- Compare any security type using fundamentals, valuation ratios, financial statements & more
- Implement custom scores and rankings built from your favorite metrics
- Document due diligence when analyzing portfolios and securities

→ *Learn more about Comp Tables & Quickflows*

5 — Comprehensive Datasets

- 25K+ Equities, 45K+ Mutual Funds, 4K+ ETFs, 10K+ SMAs, 26K+ Indices, and more
- Tailor your analysis using 4,500+ quantitative and qualitative financial metrics
- 450k+ Economic Indicators including Coronavirus, Cryptocurrency & ESG data sourced from reputable government agencies and private outlets

→ *Learn more about the Tools & Key Features*

6 — Customer Support & Other Resources

- Partner with your dedicated account manager for account set-up, personalized onboarding, and tailored trainings based on your use cases
- Use Live Chat to reach our US-based support team with any and all questions

→ *Learn more about the YCharts Customer Support*