



Developed by fund selectors for fund selectors, Digital-Advisor evaluates thousands of funds based on qualitative criteria combined with investor's needs and values. Within seconds, it generates a short-list of eligible active and passive funds.

The time has come for action

The demands on fund research have increased dramatically in recent years – but not the budgets. Consequences of miscounselling are too costly nowadays. Who wants to stay in this business, needs a groundbreaking new approach. With Digital-Advisor you will **find the right fund for any request in less time**. You respond superbly to client needs and create real value. **Compliance and regulators will leave you in peace** as the **selection process is well documented** at all times.

Ranking	1	2	3
Select	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fund Name	Comgest Growth Plc - Emerging Markets	Neuberger Berman Inv. Funds Plc - Emerging Markets Equity	RAM (LUX) Systematic Funds - Emerging Markets Equities
+ Rating	buy		
+ Fund Company	Comgest	Neuberger Berman	RAM Active Investments
+ Documents			
Best Fit Score >	8.38	7.66	7.78
- Matching	93%	86%	96%
Bottom-up driven decisions (50%)	100%	100%	100%
Defensive investment style (50%)	87%	73%	92%
Strictly active funds without derivatives	OK	OK	OK
- Quality Score (Active Passive)	7.9	7.4	6.9
Asset Management Culture (14% 34%)	8.1	7.0	7.3
Transparency (5% 10%)	5.6	5.9	6.0
Investment Process (14% 0%)	8.1	8.4	6.8

Who benefits?

★ Fund analysts can leverage their selection skills

Score funds early stage on quality and not just on past performance. Scrutinise your short-lists and holdings with ease while immediately understanding the pros and cons of a fund. Speed up your time-to-market for new recommendations before it is too late!

★ Client advisors can quickly create tailored investment proposals

Forget generic fund recommendations – create real value by considering investor needs to generate tailor-made fund recommendations. Access Digital-Advisor's comprehensive analyst reports to understand what a fund is really about and prevent miscounselling.

★ Fund supermarkets transform into AI for fund selection

Enhance the value proposition of your existing advisory tools by seamlessly integrating digital fund research! Allow your users to express their desires, values and market expectations to receive personalised short-lists of the most suitable funds.

★ Robo advisors enhance loyalty with client-centric portfolios

Climb higher up the value chain. Do not just offer generic ETF portfolios, ask Digital-Advisor to help populate portfolios with funds reflecting investors' needs and values. This encourages loyalty in the investment solution, even under difficult market conditions.

Choose the version of Digital-Advisor best suited to your needs. Get access to:

- fundinfo's entire universe with performance data and documents for 20 000+ funds.
- Structured due-diligence data for the most important 3 000+ active and passive funds.
- Information about portfolio sustainability from MSCI ESG.
- Algorithmic scoring on quality and matching with investor needs.
- Production and distribution of fund research supported by multi-lingual robo text.

Digital-Advisor product packages



Standard

This is our recommended package for smaller IFAs, to find best funds for specific needs out of a restricted "sponsored" fund universe.

for free



Advanced

This is the preferred choice for IFAs or small/medium-sized banks that want to find the best funds out of fundinfo's full universe and to thoroughly manage their fund research process.



Premium

This is the ultimate solution for banks, fund supermarkets or robo advisors that require customised fund universes or report designs, multilingual content or API access.

Key Features

Access to full fund universe	-	✓	✓
Filter on suitability	✓	✓	✓
Match with needs and expectations	✓	✓	✓
Match with sustainability requirements	✓	✓	✓
Score on quality	✓	✓	✓
Shortlist funds with best-fit score	✓	✓	✓
Research in-depth based on data and docs	✓	✓	✓
Evaluate portfolios of funds	✓	✓	✓
Approve funds meeting minimum criteria	✓	✓	✓
Recommend funds preferred by analyst	✓	✓	✓
Comment by analyst and/or robo text	{✓}	{✓}	✓

Additional Output

Fund list	{✓}	{✓}	✓
Analyst reports	✓	✓	✓
Transparency reports	-	-	✓
Due diligence reports	-	-	✓
Monitoring report on quality, AuM, performance	-	-	✓

Customisation

Your customised fund universe	-	-	✓
Your own scoring methodology	-	-	✓
Your own matching criteria	-	-	✓
Your own rating scale	-	-	✓
Your comments about more than one topic	-	-	✓
Your comments in more than one language	-	-	✓
Your corporate design for reports and lists	-	-	✓
Distribute your recommendations via Digital-Advisor	-	-	✓
Access Digital-Advisor via API	-	-	✓

To create your own Digital-Advisor account, visit: <https://digital.fundinfo.com>

Please contact info@fundinfo.com for more information.