

## PRESS RELEASE

# ifund and fundinfo launch “Digital-Advisor” for fund selection

## Expert system scrutinises active and passive funds while considering investor’s preferences and convictions



Is your fund due-diligence looking at the complete picture? Digital-Advisor gives you powerful insights into all attributes of a fund.

**Zurich, Switzerland, 7 December 2016** – ifund and fundinfo announce the launch of Digital-Advisor, a cloud-based, expert system for fund selection.

The tool scores active and passive funds based on scientific criteria derived from up-to-date and in-depth research on a wide range of success factors. It analyses data about fund houses, fund managers, and their investment processes, then combines the results with an investor’s preferences and convictions to instantly generate a list of recommended mutual funds and ETFs.

Fund analysts can use Digital-Advisor to obtain a short-list of attractive funds which they can evaluate in greater detail with fund managers. Banks can use the plug-in within their advisory services to rapidly identify funds that best reflect the CIO’s current view and customer specific requirements. Robo-Advisors may now for the first time include active funds in their offering.

Jan Giller, Head of Marketing and Sales at ifund and fundinfo said, “Digital-Advisor is the first expert system that evaluates both active and passive funds based on many years of research and scientific evidence, then combines the results with individual investor preferences and emotional convictions. Thanks to this unique technology, funds can be selected far better than with the usual past performance-related data.”

Digital-Advisor takes advantage of years of due-diligence performed on an ongoing basis by fund experts at ifund based in Switzerland. Thousands of active and passive funds have been analysed in a highly structured manner so that their information may be systematically evaluated and scored by Digital-Advisor. By constantly monitoring the legally relevant aspects of each fund such as business scope of the fund house, ownership, legal terms, guidelines for the fund, employment of derivatives and leverage, etc., the tool also ensures that customers and advisors fulfill the regulatory requirements at all times.

With Digital-Advisor, investors can invest in funds that meet specific criteria such as fund house profile, investment style, sustainability, and manager experience; the tool takes investor’s personal preferences and convictions into account. Digital-Advisor may be used as a stand-alone tool, or embedded into existing investment advisory solutions via APIs.

For more information about Digital-Advisor, please contact [info@fundinfo.com](mailto:info@fundinfo.com).

### About fundinfo

fundinfo AG hosts one of the leading international platforms for information and mandatory publications of investment funds. The platform [www.fundinfo.com](http://www.fundinfo.com) strengthens the network between fund houses, fund distributors and investors and is recognised by financial market supervisory authorities for mandatory publications. The service is available in Europe and Asia, and covers thousands of funds from the world’s largest fund houses. With millions of fund documents, data, prices and ratings available on-demand, the platform is a unique source of information for the fund industry. Founded in 2005 and headquartered in Zürich, Switzerland, fundinfo AG has offices in Berlin, Frankfurt, London, Madrid, Hong Kong, Singapore and Paris. For more information, visit [about.fundinfo.com](http://about.fundinfo.com).

### About ifund services

Founded in Zurich, Switzerland in 2000, ifund services AG is a leading, independent fund research firm providing fund research, manager selection, and “Digital-Advisor”; an innovative and powerful expert system for fund selection. Clients include banks, asset managers, family offices and pension funds. ifund services has signed the UN Principles for Responsible Investment and integrates sustainability criteria in fund analysis. For more information visit [www.ifundservices.com](http://www.ifundservices.com).



**Contacts:**

**fundinfo AG**

Diana Mampell  
Marketing Manager  
Staffelstrasse 12  
CH-8045 Zürich  
Switzerland

Tel: +41 44 286 91 01  
Email: [diana.mampell@fundinfo.com](mailto:diana.mampell@fundinfo.com)  
Web: [www.fundinfo.com](http://www.fundinfo.com)

**ifund services AG**

Matthias Weber  
Partner & CIO  
Staffelstrasse 12  
CH-8045 Zürich  
Switzerland

Tel: +41 44 286 80 00  
Email: [matthias.weber@ifundservices.com](mailto:matthias.weber@ifundservices.com)  
Web: [www.ifundservices.com](http://www.ifundservices.com)