



Thirst for on-demand research spurs fundinfo upgrade

By Ashley Lowe / 08 Jun, 2018



Research platform fundinfo has expanded the capabilities of its Digital Advisor tool to meet the needs of the on-demand research market.

Co-founder Matthias Weber said the upgrade was in response to rising client expectations. 'It's about speed. Nowadays you have to generate value added for the clients. You don't have two to three weeks to get research: you need it tomorrow, if not today,' Weber told *Citywire Switzerland*.

'You need data to screen, to have an idea about available funds within minutes, and then have your shortlist with documentation available so you can recommend the fund within 24 hours.'

This points to an overarching trend in which customers want customised solutions, said Weber.

He believes the active role of a wealth manager is still important, despite the popularity of cheaper ETFs, and that platforms like fundinfo offer a quick and affordable way for investors to meet client needs.

'ETFs are low cost, but they're standardised, so you cannot meet very specific client needs. People are, for example, interested in boutiques, and in dealing with people who have experienced many crises.'

The platform's new features include access to fund presentations and standard DDQs, the ability to rate and comment on funds, and real-time fund reports.