

Incorporate a Trend Capture Analysis to Improve Returns and Reduce Risk



Trendrating Solutions for Active Managers

According to S&P Dow Jones Indices SPIVA® the vast majority of funds underperform their benchmark. Most of these funds lack the inclusion of a Trend Capture Analysis.

Price trends are there all the time and the distribution of performance across stocks is huge. In 2017 the S&P 500 recorded a gain of 20% , but the top 20% performers in the index gained on average 61% and the bottom 20% lost 9%. This performance dispersion presents a huge opportunity if you are using the right tools.

With this broad distribution of performance, intelligent stock-picking can make a huge difference, i.e. select some of the winners and avoid most of the losers.

A number of fund managers still perform stock selection only on the basis of fundamental analysis and analyst opinion. This old-school approach is not delivering results as the SPIVA data confirms.

The key is to overlay a trend capture analysis on top of your fundamental analysis to find noticeable instances where prices are disjointed from fundamentals. Trendrating is a new paradigm of efficiency designed to enable users to maximize performance, without changing their existing research process.

Benefits for Active Managers

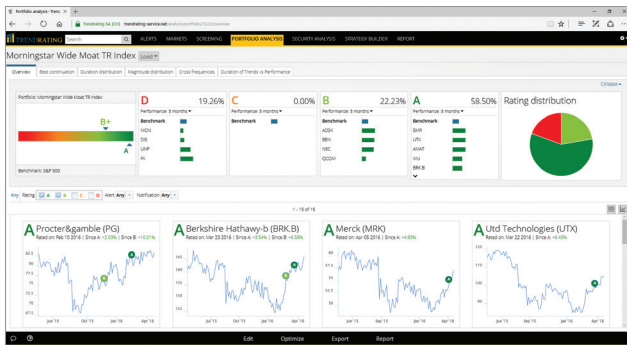
- Get alerted on actionable ratings (A,B,C,D) globally for over 18,000 securities
- Continuous quantitative scoring helps decision making by determining strong ratings vs. potential downgrades
- Breakthrough technology spots reversals sooner than old school methods like “Point & Figure”
- Trend Capture Analysis works seamlessly with most existing investment processes

Supported Tasks in Trendrating

- Rate your portfolio exposure to positive vs. negative trends and rebalance the exposure for maximum performance
- Analyze individual stocks, ETFs, sectors and countries to validate ideas and spot opportunities
- Create, test and optimize Trend Capture Strategies as an overlay to any desired investment universe
- Easily export analytics and import portfolios to and from Excel

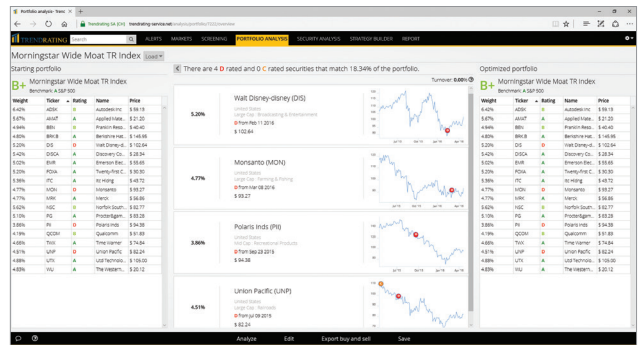
Trendrating for Active Managers

Portfolio Analyzer



Leverage our robust Trend Capture Rating to get alerted to changes in your portfolio to better control risk.

Portfolio Optimizer



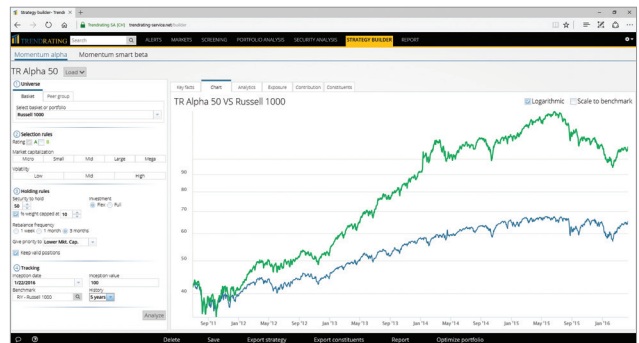
Run personalized Trend Capture analyses on holdings for optimal asset allocation and improved performance.

Ranking Template

SECURITY	NAME	SECTOR	DATE	PRICE	TREND RATING	TR-B-TRE	RETRACEMENT
PG	Procter & Gamble	Consumer Goods	2018-04-23	124.11	12	12.0%	12.0%
BRK.B	Berkshire Hathaway B	Financial	2018-04-23	281.11	11	11.0%	11.0%
MRK	Merck	Pharmaceuticals	2018-04-23	100.11	10	10.0%	10.0%
UTX	United Technologies	Aerospace	2018-04-23	150.11	9	9.0%	9.0%

Rank stocks and ETFs by Smart Momentum, % Capture or Avoidance, Retracement, etc. for better selection.

Strategy Builder



Easily design and test investible momentum alpha, smart beta or sector rotation strategies leveraging Trendrating's advanced algorithms in an intuitive codeless interface.