

Portfolio Proposal Tool (PPT)

GENESIS PPT IS...

A productivity tool for Wealth Managers/Private Bankers to generate new investment business.

PPT allows wealth managers to tailor Individual investment portfolios per client. Whether it is a current client or potential client the platform manages the complete workflows of wealth managers proposing portfolios to their clients. The platform audits all changes, presents portfolio performance analytics & provides internal MIS.

The key features:

- Insert/update default portfolio structures for each risk profile and net amount range
- Manage portfolio asset class breakdown & components within each asset class
- Multi-Asset class support, including FIXED Income, Equity, Derivatives, Funds and CDs
- Integrate with external portfolio optimization tools
- Manually upload prospect's portfolio(s) held with another Provider
- Create/copy new proposal for an existing client/prospect
- Tailor portfolio to meet client preferences
- Record pending/accept/reject status of each portfolio
- Connect to quote management, EMS or OMS to execute accepted portfolios
- All user actions permission controlled and audited
- Secure/robust design
- Provision of user-friendly Web GUI





ABOUT GENESIS

Genesis is a global Capital Markets software company with a difference.

We bring a fresh approach to helping firms adapt and innovate their business and operating models in an ever-challenging, constantly changing environment. Pioneering vision, coupled with our technical innovation, is at the heart of everything we do.

LOW CODE/PRO CODE: We are a “low code/pro code” application platform, cloud delivered as a service (aPaaS).

PERFORMANCE: Developed over the years with Capital Markets firms, the Genesis platform is empowering the next generation of agile solution delivery.

FLEXIBILITY: We’ve flexible delivery options, so you can pick the best approach for your needs – now and in the future. “Build It Your Way”, “Build IT Together” or “Ready Built”.