



swissQuant
Digital advisory – An insight

Intelligent technology for leaders in financial services

swissQuant's wealth management services...

- provide digital advisory end-to-end solutions
- deliver automated portfolio management to large portfolio and wealth managers

90 quant engineers, mathematicians & physicists

60 banks and clearing houses as clients

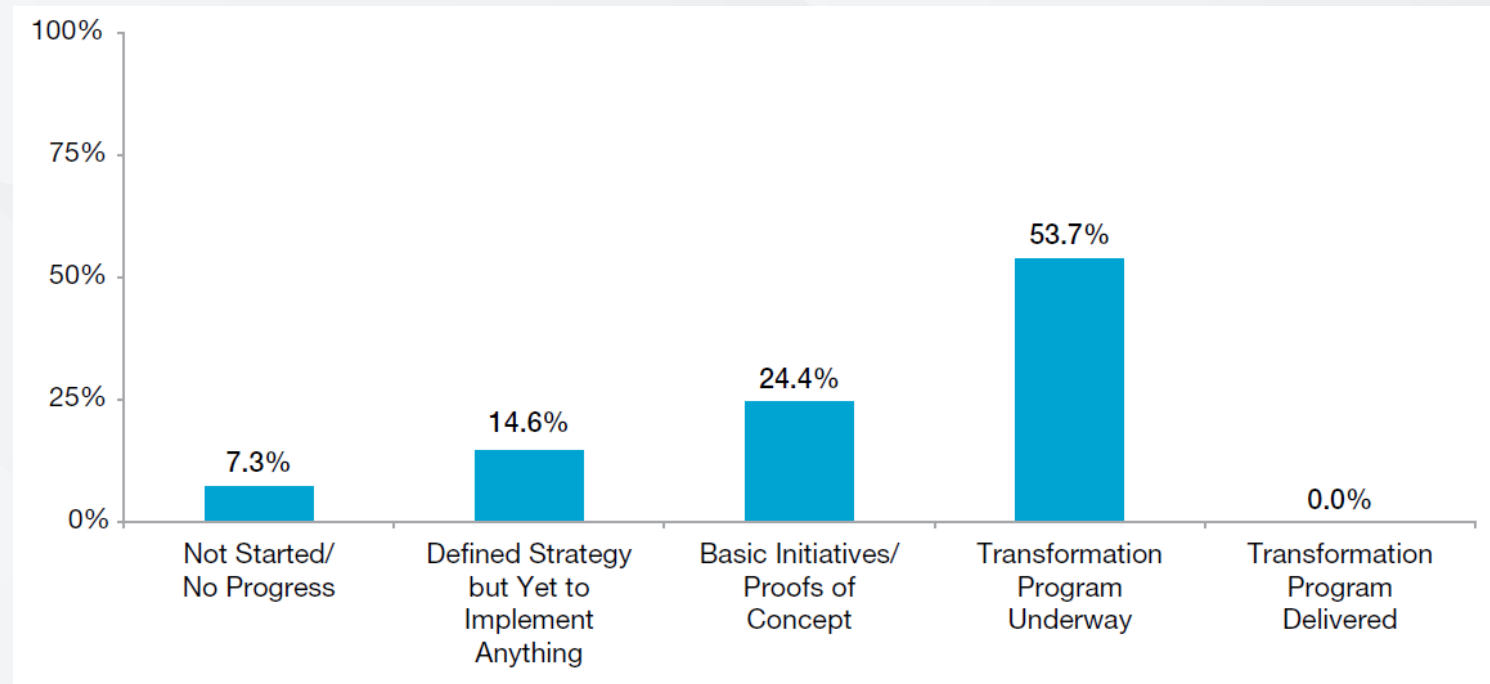
500 billion CHF assets managed by swissQuant's systems

12 countries swissQuant clients are operating in

13 years of delivering powerful and intelligent technologies

The financial industry is transforming to digital

Adoption is slow...



¹Source: Capgemini Financial Services Analysis, 2017; Executive Interviews 2017

...but >90% of the surveyed¹ banks have initiated a digital advice program

Hybrid Advice: best of both worlds



Wealth Manager-Led



Automated/Self Service

fully manual


fully automated/AI



Naina

@nainablabla



 **Folgen**

Ich bin fast 18 und hab keine Ahnung von Steuern, Miete oder Versicherungen.

Aber ich kann 'ne Gedichtsanalyse schreiben. In 4 Sprachen.



RETWEETS

4.485

FAVORITEN

8.380



03:49 - 10. Jan. 2015

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Hybrid

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“...the **human** element
remains a **key differentiator**”

Capgemini World Wealth Report 2017



Wealth Planning
Goal Based Wealth Management



Client Profiling
Risk Profiling, Customer
Engagement



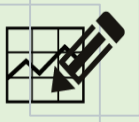
Portfolio Construction
State-of-the-art Optimizer



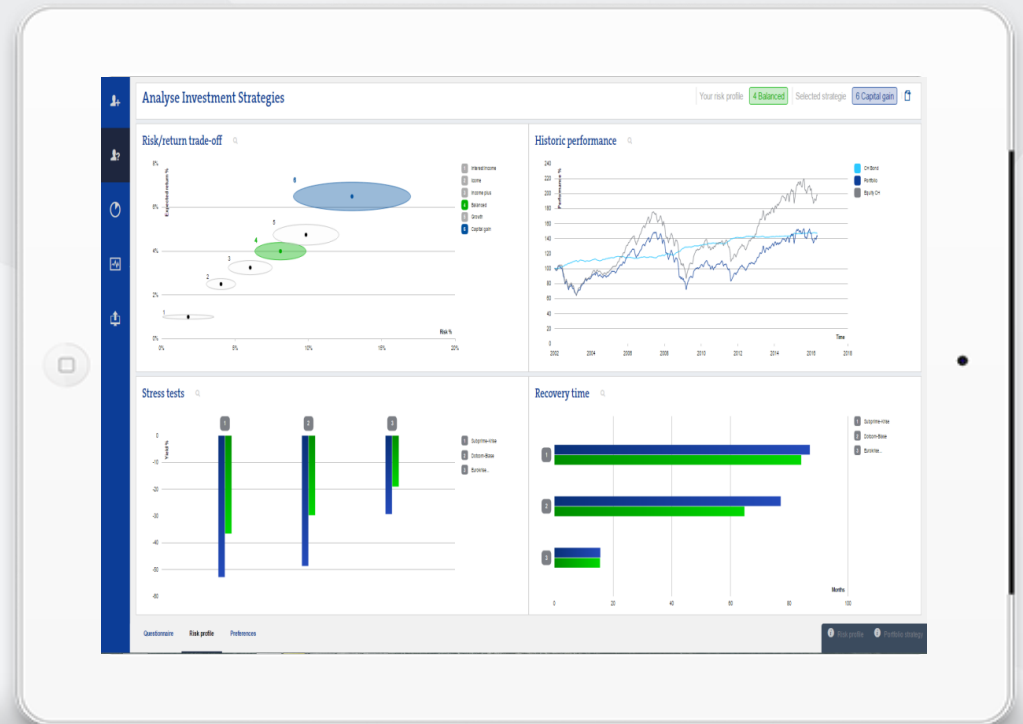
Portfolio Health Checks
Monitoring of Client Portfolios



Pre-Trade Suitability
Real time risk assessment



Portfolio Adjustment
Automated investment proposals



Demo

ImpaQt: increasing efficiency & profitability

Enable
digitization

Unlock
customer journeys

Strengthen
client relationship

Achieve
regulatory compliance

Reduce
liability risk



Q&A



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