



Fundastic

Optimize your fund- and ETF-product-universe with “Artificial Intelligence” (AI).

May it be for your own use as an investor or may it be for your product approval process or just for having the best investment products ready for your client base: Fundastic delivers AI-based ratings and performance analyses beyond the usual. This optimizes the selection process of funds and ETFs and ensures sustainable fund investments over short term and long term investment horizons.

Segments:

Private Banks
 Universal Banks
 Asset Management / FoF
 Private Wealth Management

Focus:

Efficient product selection processes
 Increased customer satisfaction through outperformance of your product range
 Differentiation from the competition
 Sustainable sales success

Technology:

Artificial Intelligence
 Machine Learning
 Cloud Computation
 Big Data

Our solution

Coverage of an extensive fund- and ETF-universe

Fundastic covers almost the entire global fund and ETF universe (> 350,000 ISINs). Fundastic is able to identify the best-in class investment opportunities in the fund universe.

Artificial Intelligence to enhance your product usage or offering

- Fundastic analyses the existing product universe. It eliminate funds and ETFs with below-average or poor quality.
- In addition, we compare your product offering with the available product universe in the market clustered by asset class, region or industry.
- We make sure that you are only working with funds which are aligned with your quality standards over longer periods.

Refinement of existing fund ratings in use

Fundastic can even add value if you rely on existing fund ratings, may it be from Morningstar, Lipper or others. The algo is able to identify the best of best even in a 5-star category and ensures that fund quality is based on talent and investment process and not coincidence in an investment phase.

More efficient processes and sustainable sales success

Fundastic makes sure that you are only investing in or offering the best available funds products. Efforts for monitoring, evaluation and benchmark analysis of your current product usage or offering are significantly reduced by the AI-based technology. A real USP in the fund selection process.

400+
specialists
 Across Europe
 and APAC

20+
Years
 In capital markets
 advisory and
 software

250+
Clients
 In banking and
 asset manage-
 ment

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Fundastic

Optimize your actively and passively managed fund- and ETF-product-universe with "Artificial Intelligence" (AI).

Fundastic supports you with artificial intelligence (AI)-based rating and performance analyses and in optimizing the selection of funds and ETFs that document sustainable quality over long periods of time.

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COVERAGE OF THE ENTIRE FUND- AND ETF-UNIVERSE

We have been covering the entire global fund and ETF universe (> 350,000 ISINs) for many years, in order to identify high-quality funds and to determine the best alternatives for you and your clients on a sustainable basis.

ARTIFICIAL INTELLIGENCE TO OPTIMIZE YOUR PRODUCT UNIVERSE

- Fundastic analyses your existing product universe; eliminate funds and ETFs with below-average quality.
- In addition, we compare your product offering with the available product universe in the market clustered by asset class, region or industry.
- For example, identify funds and ETFs with comparable or lower risk but higher returns to optimize your product range.

REFINEMENT OF THE MORNINGSTAR RATING

Fundastic also takes existing Morningstar ratings into account and refines them to identify the best funds within a 5-star category.

MORE EFFICIENT PROCESSES AND SUSTAINABLE SALES SUCCESS

Fundastic supports you in making your complex product selection process efficient and lean. Efforts for monitoring, evaluation and benchmark analysis of your current product offering are significantly reduced by the AI-based technology. Secure your sales success in the long term through higher average returns and satisfied customers.

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