

FE Analytics



All the fund research and analysis you need

FE Analytics is a one-stop tool for all your fund research, analysis, portfolio construction, due diligence and ongoing monitoring. Powered by FE fundinfo, FE Analytics supports your entire investment proposition, whether you invest in individual funds, multi-asset funds or SMAs. It can help you analyse investment solutions, increase efficiency and demonstrate the value of your investment propositions to your clients.

How FE Analytics can support your business

Win new business

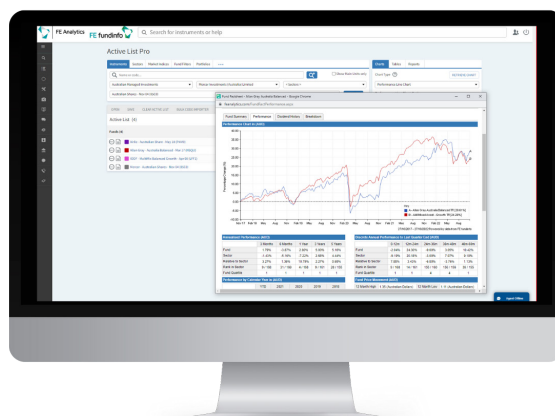
Demonstrate the value of your proposition side-by-side against your prospect's existing investments. Use our Investment Forecaster to compare the projected returns of their current portfolio against your suggested investment model. Create professional, branded reports to present to your prospect.

Manage existing clients

Easily monitor portfolio returns and get alerted on any significant changes to the underlying investments. Demonstrate the value of your investment advice using our Dynamic Portfolio Tool to show 'what if' scenarios. Ensure you have a fully compliant process by saving an audit trail of all your research and historical portfolio changes to your client.

Improve your investment process

A wide variety of research, modelling and reporting tools can help you optimise your investment selection, conduct objective due-diligence, and demonstrate the value of your service in a streamlined, fully compliant and profitable manner.



Key features

Unparalleled investment data

Access over 15,000 financial instruments across a large range of investment universes including managed funds, ASX securities, investment bonds, SMA's, superannuation (including industry super funds) and retirement income.

Data types include performance, pricing, ISS ESG ratings, RG97 fees & costs and original fund documents including fact sheets, product disclosure statements, TMDs and more.

Custom client reporting

Choose from 150 data fields to tailor and customise your table report to your exact requirements, including custom font, colours, logos and other branding features.

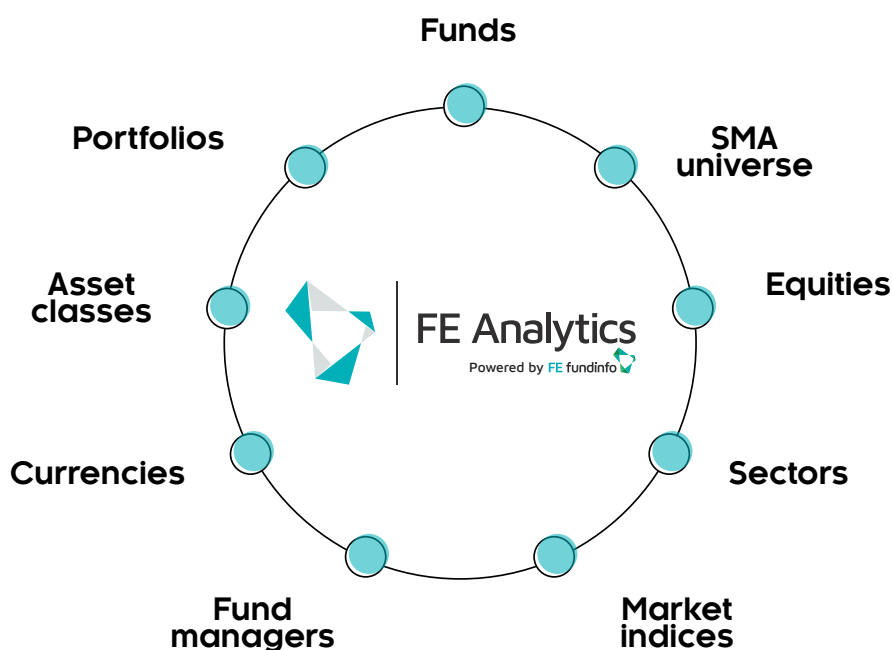
Investment forecaster tool

Demonstrate the value of your advice by factoring in historic fund swaps, rebalancing and adviser charges. Use a wide variety of data presentation tools to conduct portfolio comparisons and compare projected returns.

Ongoing training and support

FE fundinfo have specialists who provide extensive ongoing training and support to all clients. The support team are available by telephone, email and live chat.

Access whole of market data



Find out more

For more information visit zenithpartners.com.au or contact our helpful business development team via the below contact details.



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