

FE Analytics



Helping you differentiate your offering in a crowded marketplace

FE Analytics is an investment research tool used by Australia's leading asset consultants and fund managers and offers a wide range of planning, modelling, analytical, reporting and presentation tools. FE Analytics is powered by FE fundinfo's enriched fund data with thousands of data points updated on a daily basis.

Using FE Analytics to differentiate your offering

See through the eyes of an adviser

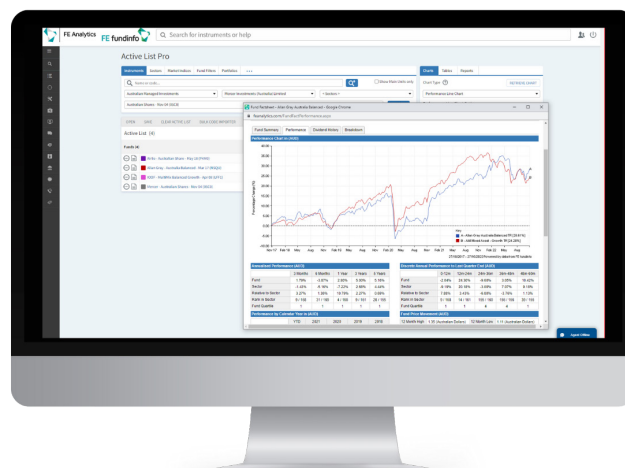
FE Analytics gives you access to the same data, research and analysis tools trusted by many Australian financial advisers. Gather insight on how they evaluate prospective investments and where they seek value.

Understand your competitors

The latest fund data and comparison tools help you analyse how your strategies stack up against your competitors. Set up alerts and track any significant performance, ratings or capital event changes on specific funds within your peer group.

Differentiate your offering

With the help of reporting and presentation tools you can differentiate your proposition from that of your peers and highlight your strengths. Using scenario analysis, you can also demonstrate which of your funds may complement other investments to form a winning portfolio.



Key features

Depth of 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.

Easy access and integration

FE Analytics is a web-based tool that can be accessed easily from any location. There is no need to install any software. It also integrates with most back-office systems which allows you to import any portfolios for analysis.

Competitor alerts

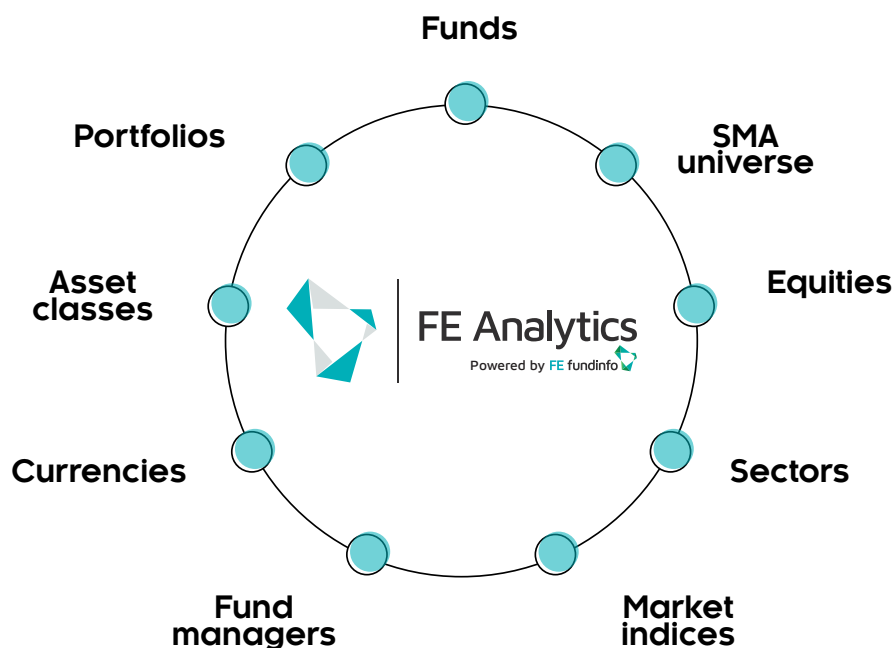
Build and manage alerts on competitors' funds for any major price, performance, ratings, costs and charges, risk score or capital event changes. See the most bought and sold funds in your sectors and find out where advisers are seeing value.

You can also view the holdings of your peers and evaluate how they may affect performance and investment strategy

Custom reporting

Comprehensive pre-built and custom reporting tools allow you to create market movement reports, sector league tables, member lists, sector and historical breakdowns. More than 150 data fields are available to build tailored charts and reports.

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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