

# Powerful solutions for all stages of your advisory process.

**The integrated solution consisting of Infront Portfolio manager and Infront Advisory Solution meets all requirements of private and retail banking, private wealth management, independent asset managers as well as foundations and family offices. The solution can be tailored to the requirements of different users in the areas of investment advice, asset management, middle and back office. Whatever your needs, the modular system of Infront advisory solution covers all stages of the advisory process.**

While standardised and modular, our Advisory Solution can be customised to your individual processes, supporting you in all areas of investment advice.

Advisory Solution adds to our market-leading range of Portfolio Management Solutions. This new application is specifically tailored to client advisors and relationship managers.

All processes are based on a single platform: identical data and order interfaces as well as (customised) analyses and reports are provided consistently across different user groups.

This allows you to implement our systems or single modules quickly and cost-effectively and ensure investment reliability.



**Portfolio management**



**Advisory and relationship processes**



**Market data and real-time analyses**



Our in-depth financial and technical know-how helps to continuously improve the various modules of Advisory Solution. The individual components are fully integrated and meet the corresponding current standards.

## Benefits at a glance

### Process efficiency

High-quality, structured applications for different user groups

Modular application components

Quickly adaptable to changing requirements

### Legal compliance

Legally compliant investment advice documentation

Audit-proof change tracking

### Usability

Easy to use and navigate

Greater competitiveness through greater differentiation

### Investment reliability

Analyses and reports already customised in Infront portfolio manager are also fully available in Advisory Solution.

## Portfolio Management

With our Web Solution for Portfolio Management, you can always stay up-to-date and provide actionable investment advice wherever you are.

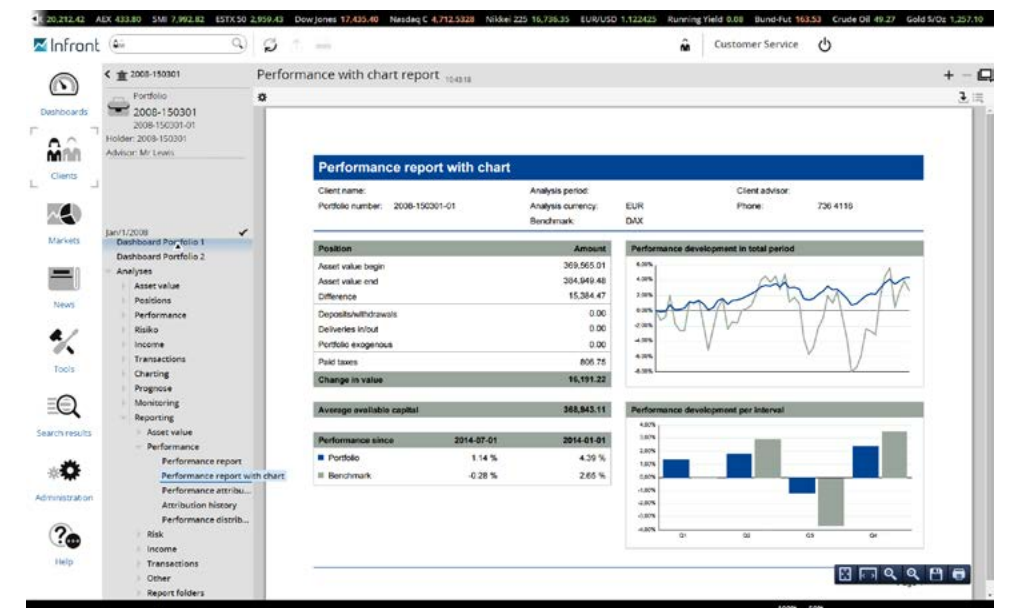
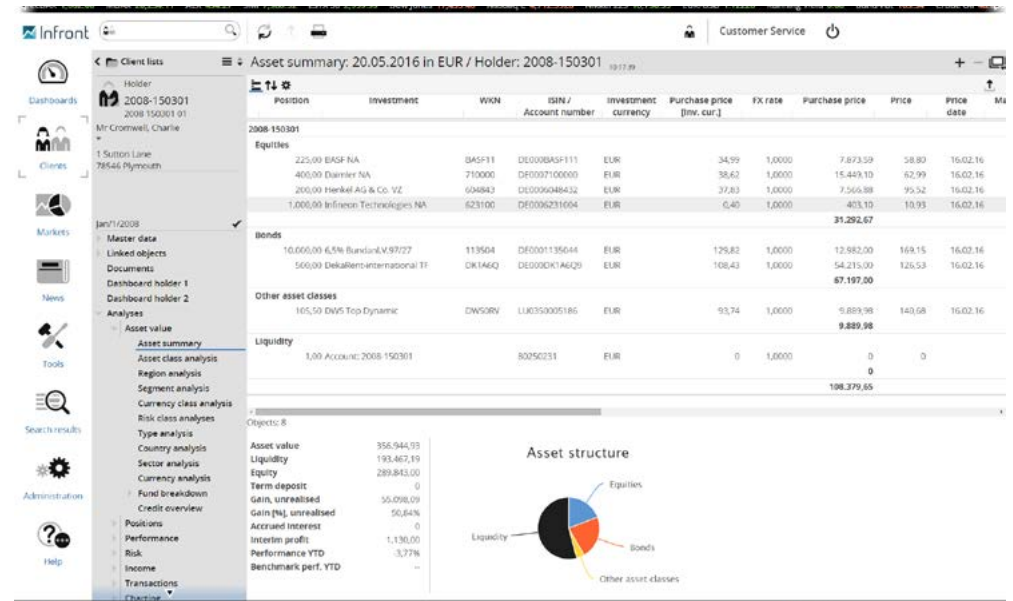
Access the online application's functions and data in accordance with your company policy and quickly find the information you need in the intuitive user interface.

You have access to the entire information on all clients and portfolios. Open individual reports and analyses to prepare for meetings with clients.

Specify alert definitions for asset allocations, risk limits, loss thresholds, maturities, birthdays or changes in equity to provide timely and adequate responses. You are immediately notified if a corresponding event occurs.

Market Data and news can be directly integrated into your Portfolio Management. Use the various work areas for parallel workflows and analyses and view information on individual clients or previously defined portfolio groups.

Handle your investment decisions and client orders directly using the integrated order interfaces.





## Advisory process

The many components of Advisory Solution can be combined to accurately represent your individual workflows.

Use the client management and client profiling to record and edit the master data of your clients and prospects in accordance with MiFID.

During the meeting with your client, use the asset analysis and portfolio simulation to record the current financial situation of new clients or evaluate it together with your long-standing clients.

Review different scenarios in the portfolio simulation and thus make the changes and risks of an investment decision transparent and simple for the client.

Generate the corresponding Product Information Sheets (PIB) required by law as well as bank-specific additional information directly in the application. Based on the data recorded during the client meeting, vwd advisory solution generates easily customisable investment advice documentation that meets all regulatory requirements.

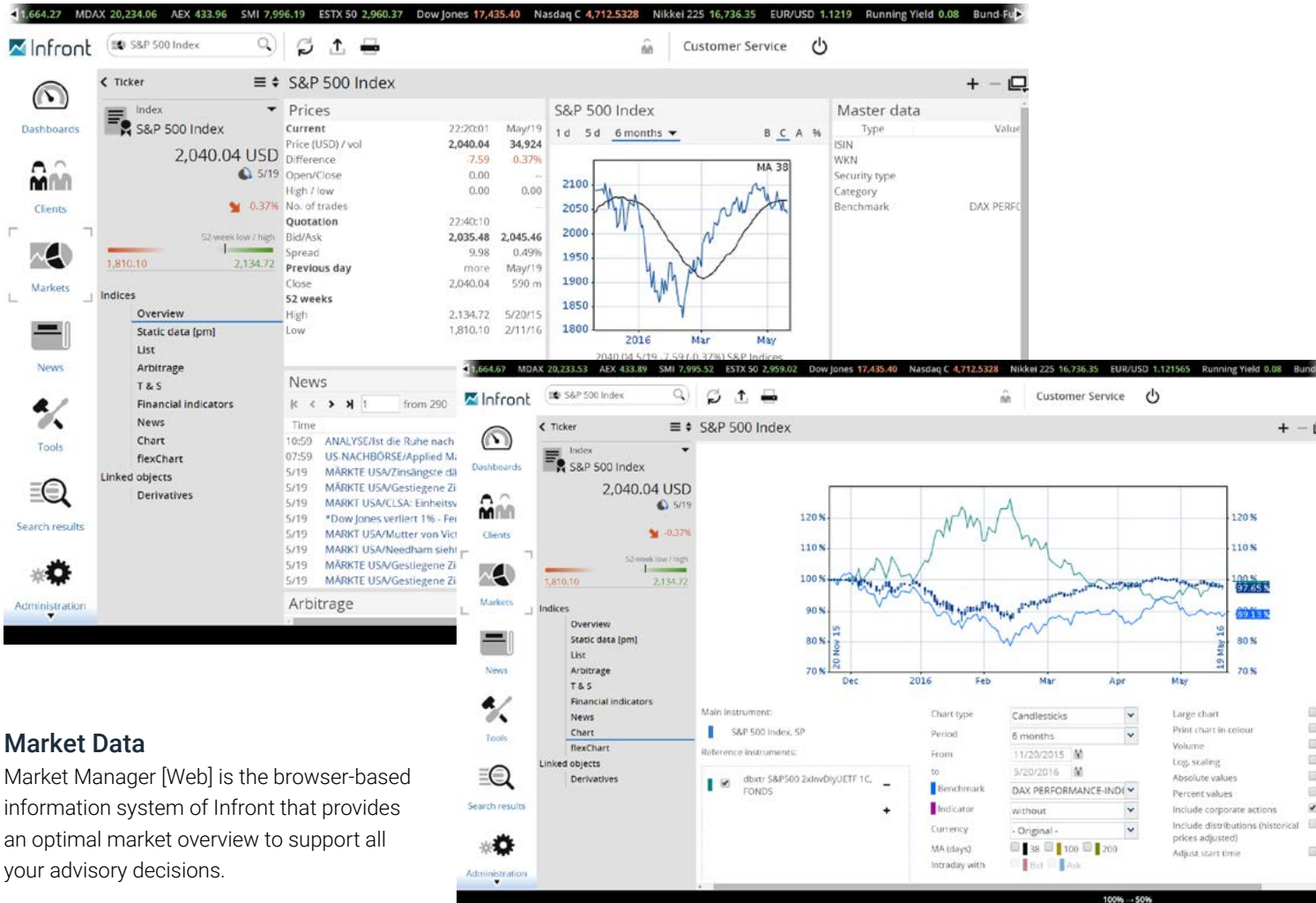
The screenshot displays the Infront Advisory Solution interface, which is divided into several sections:

- Top Bar:** Shows various market indices and their values, such as DAX 9,623.48, MDAX 16,024.89, and S&P 500 INDEX.
- Left Sidebar:** Contains navigation icons for Clients, Markets, News, Tools, Search results, and Administration.
- Main Content Area:**
  - Markets Overview:** A table listing stock indices for Germany, Europe, and Worldwide. Columns include Name, Reference, Price, Time, +/-, +/-%, Open, High, Low, and Close.
 

Category	Name	Reference	Price	Time	+/-	+/-%	Open	High	Low	Close
Germany - Overview	DAX PERFORMANCE INDEX		9,892.72	11:11:06	+96.83	+0.99%	9,878.49	9,921.59	9,866.44	...
	L/E-DAX TR EUR		9,876.28	09:00:00	+73.59	+0.75%	9,802.69	9,877.00	9,802.69	...
	X-DAXTR		9,881.36	09:02:23	+42.89	+0.44%	9,899.87	9,919.37	9,863.36	...
	MDAX PERFORMANCE-INDEX		20,201.03	11:10:36	+216.18	+1.08%	20,077.26	20,242.36	20,077.26	...
	TECDAX TR		1,662.61	11:11:06	+15.46	+0.94%	1,651.91	1,665.03	1,651.88	...
Europe	ESTX 50 PR.EUR		2,952.16	11:11:00	+32.94	+1.13%	2,930.43	2,963.11	2,930.43	...
	STXE 50 PR.EUR		2,818.56	11:11:00	+29.52	+1.06%	2,795.89	2,826.96	2,795.89	...
	EURONEXT 100		854.01	11:11:00	+9.22	+1.05%	852.65	857.28	852.61	...
	CAC 40		4,330.45	11:11:00	+47.91	+1.12%	4,323.62	4,348.17	4,323.62	...
	SMI PR		7,978.54	11:10:36	+69.75	+0.88%	7,947.46	8,003.63	7,944.59	...
Worldwide	DJ Industrial Average		17,435.40	5/19	-91.22	-0.52%	0.00	0.00	0.00	17.4
	NASDAQ Composite		4,712.5328	5/19	-26.5866	-0.56%	0.00	0.00	0.00	...
	NASDAQ-100		4,315.5787	5/19	-22.6536	-0.52%	0.00	0.00	0.00	...
	S&P/TSX 60		805.86	5/19	1.75	0.22%	804.06	805.86	798.70	805.86
	NIKKEI 225		16,736.35	08:20:01	+89.69	+0.54%	16,594.99	16,770.87	16,548.34	16,736.35
  - Eurex Futures (endless):** A table listing futures contracts like DAX FUTURES and EURO-BOBL-FUTURE.
  - Anlageplanungsliste:** A transaction planning interface showing details for two entries (Eintrag 1 and Eintrag 2). It includes fields for transaction type (e.g., 'Verkaufen', 'Kaufen'), deposit, and limit. A dropdown menu is open, showing options like 'n/a', 'Kaufen', 'Verkaufen', 'Zweitwert', 'Halten', and 'Nicht kaufen'.

The documents are also automatically stored and tracked so that you can quickly access them during the next meeting with your client.

Finally, you can forward all transactions using automated order interfaces for a timely order placement.



### Market Data

Market Manager [Web] is the browser-based information system of Infront that provides an optimal market overview to support all your advisory decisions.

This module is fully integrated in Advisory Solution and can be quickly activated if necessary. No switching between different programs and user interfaces is required, as all important information is always just a few clicks away.

Market Manager [Web] provides detailed information on equities, warrants, bonds, funds, currencies, certificates, contracts and commodities. You can access intraday charts, economic data, comprehensive economic news, ratings and much more.

In addition to viewing data, you can also create individual watchlists and model portfolios and save each view as PDF or print it with a clear layout.

### Minimum requirements

- Server: Microsoft Windows Server 2008, 2008 R2, 2012
- Database server: MS SQL Server 2008, 2008 R2, 2012, 2014 or Oracle 10g / 11g (release 1 and release 2) / 12c
- File server for price histories: 100 GB free disk space, increasing by 5 GB per year
- Web client vwd advisory solution: Browser: IE 9/10/11, Firefox ESR 38 Safari 7, Chrome 45; cookies and JavaScript activated
- Current Acrobat Reader for viewing PDFs

### About us

Financial professionals across Europe and South Africa rely on Infront for flexible financial market solutions. We offer a powerful combination of global market data, news, analytics and trading together with integrated solutions for data feeds, portfolio management and advisory, and regulatory compliance and calculations. Our solutions serve 3,600 customers with over 90,000 professional users. With support for their complete workflow, financial professionals can manage investment decisions, reduce costs, adapt to fast-changing market requirements and work more efficiently with ever-increasing amounts of information – quickly, easily and flexibly.

More than 500 employees in 13 countries across Europe and South Africa apply their expertise to meet the challenges of our clients, ensuring they continuously receive the best solutions and services. Infront is listed on the Oslo Stock Exchange.