Gain a competitive advantage
As wealth managers face stiffer competition and lower margins due to the increased regulations and disrupting technologies, finding new ways to differentiate business practices is critical. The goal is to offer objective, personalized investment advice based on high quality data, develop tightly tailored portfolios, and ultimately monitor and manage all client portfolios more efficiently.

ImpaQt is designed to resolve these exact challenges by combining a single source of accurate, complete data from SIX with expert quantitative risk methods from swissQuant Group. Delivered in an interactive interface, the service enables wealth managers to turn investment suitability, portfolio monitoring, and on-the-spot risk management to their advantage.

Key benefits:
- Boost your advisory process with integrated calculated data of the highest quality
- Support your practice with a sophisticated digital solution
- Constantly monitor client portfolios
- Perform on-the-spot pre-trade suitability checks on instrument and portfolio levels
- Make swift comparisons on current and proposed portfolio risks
- Visualize historical investment strategies, stress scenarios, recovery periods and risk/return characteristics of investment scenarios
- Keep all client-confidential data in-house, at your institution
- Ease compliance with MiFID II and FIDLEG in terms of portfolio monitoring and pre-trade suitability
- Ensure effective management of discretionary mandates
Advise with data you trust
SIX’s award-winning data includes international securities coverage of more than 27 million instruments, consisting of market and reference data as well as historical prices and time series data. This substantiated data is used in the complex quantitative models for the risk and portfolio optimization calculations. This not only helps wealth managers solve the complex licensing issues faced when deriving and aggregating data, but also assures them that the data on which they base their decisions on is timely, accurate and complete.

Increase transparency and fulfill regulatory requirements
The combination of enriched market, historic and reference data from a single source, and risk models from quant experts help you to meet regulatory requirements relating to investor protection, including suitability checks for investments and risk disclosure in accordance with MiFID and FIDLEG regulations.

A strong and exclusive partnership
The partnership between SIX and swissQuant Group provides the two core elements needed for successful risk management and portfolio optimization: complete, high-quality and accurate data, and proven quantitative risk modelling. This alleviates the complexities of data licensing, management and compliance efforts, whilst leveraging modern risk modelling and visualization technologies for easy interpretation of results.

The ImpaQt aggregator enables on-demand portfolio analytics and optimization, while keeping all client related data in-house.

Instant portfolio optimization, whilst keeping your client data secure
The vast majority of calculations are performed on SIX servers and the relevant sensitivity, correlation and instrument risk data are transmitted one-way to you. The pre-calculated risk figures are then aggregated with portfolio information within the bank, and are available at your disposal. The result is confidentiality, as no client or portfolio data leaves your bank, and speed, as client portfolios can be recalculated on the spot.

Disclaimer:
The information provided herein constitutes marketing material. The information provided herein is not legally binding and it does not constitute an offer or invitation to enter into any type of agreement. The information and views expressed herein are those of SIX at the time of writing and are subject to change at any time without notice. They are derived from sources believed to be reliable. SIX provides no guarantee with regard to the content and completeness of the information and does not accept any liability for losses that might arise from making use of the information.

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