

PRESS RELEASE: Wealth Managers must improve ability to track future performance of asset classes, say clients

- *Just one in three (32%) wealth managers and financial advisors say their organisation is 'excellent' at tracking future potential performance, including the risks, of asset classes*
- *More than eight in ten say their company will invest further in new solutions with high quality estimates of key asset classes' future performance over the next three years, study finds*

London, July 18 2024 – Wealth managers and financial advisors need to do more to track the future performance and related uncertainty of key asset classes to properly and more effectively service their clients as they increasingly demand this type of analysis, new global research* from Ortec Finance, the leading global provider of risk and return management solutions for professional investors, shows.

Only around a third (32%) questioned in its study with wealth managers and financial advisors whose organizations collectively manage approximately £1.207 trillion said their organisation is currently 'excellent' at tracking future potential performance of asset classes. A further four in ten (42%) say they're 'good' and one in four (25%) say their organisation is 'average' at tracking future potential performance of key asset classes.

But the majority are looking to invest further in tools and solutions to improve. More than eight in ten (84%) say their company will increase how much they invest over the next three years in solutions to help advisors with good estimates of key asset classes' future performance. Around 11% think investment levels here will increase dramatically. Only 15% say the level they invest in these solutions will stay the same over the next three years compared to now.

This need to invest is being driven by clients. The main reason for investing in more tools and solutions is wealth managers' need to service clients properly and more effectively. The second most popular reason given is because clients are increasingly demanding this type of analysis. This is followed by it being key to business growth and client retention, followed by the belief it will help to reduce costs and improve efficiency levels.

Tessa Kuijl, Managing Director Global Wealth Solutions at Ortec Finance said: "While wealth managers and financial advisors already invest in tools and solutions to track the future potential performance of key asset classes, clients are increasingly expecting and demanding this analysis. It's positive that most wealth managers are set to increase the level of investment in these areas to enhance their insight of this over the next three years."

Ortec Finance provides wealth managers and financial advisors with scalable solutions that enable them to manage clients more efficiently and deliver more value to those clients. Its OPAL Planning tool supports banks, advisors and wealth management firms to translate client's financial goals into an optimal investment strategy – providing forward-looking insights into whether clients are on-track regarding their investment objectives. Together with a fully integrated cash flow planning tool for a holistic view of the client situation, the OPAL Planning tool addresses both income and investment risk. Find out more:
<https://www.ortecfinance.com/en/solutions/goals-based-wealth-platform>

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Notes to editors:

*Independent research company PureProfile interviewed 100 wealth managers and financial advisors located in the UK, Canada, Italy, the Netherlands, Germany and Switzerland whose organizations collectively manage around £1.207 trillion worth of assets for clients. The survey was conducted during April 2024.

For more information, contact:

Phil Anderson, Perception A.
phil@perceptiona.com / +44 7767 491 519

About Ortec Finance

[Ortec Finance](#) is the leading provider of technology and solutions for risk and return management. It is Ortec Finance's purpose to enable people to manage the complexity of investment decisions.

This is accomplished via the delivery of leading technologies and solutions for investment decision-making to financial and real estate institutions around the world. Ortec Finance's strength lies in an effective combination of advanced models, innovative technology, and in-depth market knowledge. This combination of skills and expertise supports investment professionals in achieving a better risk-return ratio and thus better results.

Headquartered in Rotterdam, The Netherlands, Ortec Finance has offices in Amsterdam, London, Zurich, New York, Toronto, Singapore, and Melbourne. Ortec Finance helps 600+ clients manage their \$15 trillion assets under management.