
InvestEdge Announces Exclusive Partnership with Applied Finance Group

InvestEdge clients can now access AFG's compliance oversight tools

PHILADELPHIA, PA—October 10, 2017— InvestEdge, the leader in cutting-edge wealth management solutions, announced today a partnership with The Applied Finance Group (AFG), an equity research and consulting firm serving over 250 institutional investment firms worldwide. Through this partnership, AFG's smart compliance oversight tools will be available through the InvestEdge ecosystem.

“Creating a culture of compliance has become a critical priority for advisory firms as they focus on greater transparency and adhering to established risk profiles,” said Chris Ollendike, Executive Vice President of Business Development for InvestEdge. “AFG's innovative compliance technology allows firms to monitor their investment accounts for potential exposures and course-correct where needed, without disrupting their advisors' workflows.”

AFG's robust portfolio analysis, construction tools and sophisticated investment grading system will be available through the MMxCHANGE digital marketplace – a wholly owned subsidiary of InvestEdge. In addition, AFG International will provide bespoke portfolios harnessing these concepts catered to meet client specific needs.

“Financial advisors, especially those managing ultra high net worth accounts, need access to advanced compliance monitoring and portfolio analysis tools to compete,” said Saul Marquez, Partner at AFG. “Our solutions are designed to help advisors and their firms make better investment decisions and streamline their investment process allowing them to better focus on growth and client retention. InvestEdge is an ideal partner because they can seamlessly deliver our technology through their scalable platforms.”

About InvestEdge, Inc.

InvestEdge is a leading provider of innovative advisor solutions to financial institution firms. Our award-winning open architecture platform provides a full suite of tools that automates key front-office functions that include advisor dashboard, alerts, portfolio management, performance measurement, reporting, compliance monitoring, trade/rebalancing, data aggregation, client reporting and investment portal solutions through MMxCHANGE, a subsidiary of InvestEdge.

About Applied Finance Group

The Applied Finance Group (AFG) is an independent equity research and consulting firm that corrects accounting distortions and analyzes how global market sets prices to help its clients make better investment decisions. AFG's deep research engine systematically applies bottom-up fundamental analysis on over 20,000 companies worldwide to build proprietary factors that explain levels and changes in equity prices through time. Since 1995 AFG has been a global thought leader on valuation and corporate performance, helping its partners better grow their investment advisory businesses.