

Powerful & Productive Portfolio Management

With InvestEdge's leading portfolio management capabilities, firms can boost the productivity of their investment managers by organizing vast amounts of account and asset data in a way that aligns with their daily workflow.

InvestEdge's system provides instant snapshots of each account's holdings, allocations, performance and assets, so managers can make quick, informed, and better investment decisions for clients.



Leverage Third-Party Models

- Access third-party manager models that make it easy to customize investment solutions for clients
- Integrate models into the investment process to support consistency in the delivery of investment advice and eliminate costs of redundant systems



Gain Better Data Aggregation and Analysis

- Take advantage of flexible asset categories by defining up to six custom asset classes beyond the standard four categories (Equities, Fixed Income, Cash and Other)
- Aggregate held-away accounts and assets to provide a complete investment picture for clients
- Combine holdings, performance data, vendor data and other information across multiple accounts for effective and simplified analysis and reporting
- Compare existing holdings with proposed trades to see potential impact