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CASE STUDY

ROBO-ADVISOR PLATFORM

CLIENT
STARTUP WITH TEAM REPRESENTATIVES FROM
UAE, SAUDI ARABIA, INDIA, USA AND CANADA

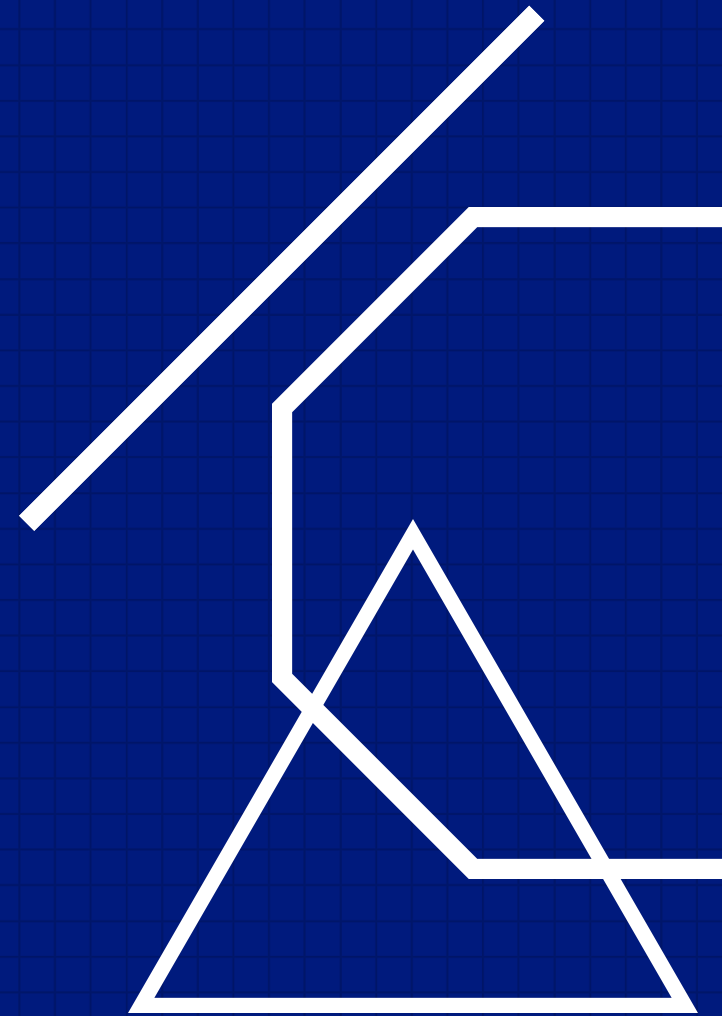
TECHNOLOGY
ASP.NET, .NET, AWS, ANGULAR

A dark blue background with a white grid pattern. A thick white horizontal line spans the top of the page. A white circle is partially visible on the right side. In the bottom left corner, there is a white right-angled triangle with a horizontal line extending from its base to the right.

**THE ROBO-ADVISOR HAS
OFFICIALLY GONE
MAINSTREAM, WITH A
SERIES OF AUTOMATED
ADVISORY LAUNCHES
OVER THE PAST YEARS
BY INCUMBENT ONLINE
BROKERS**

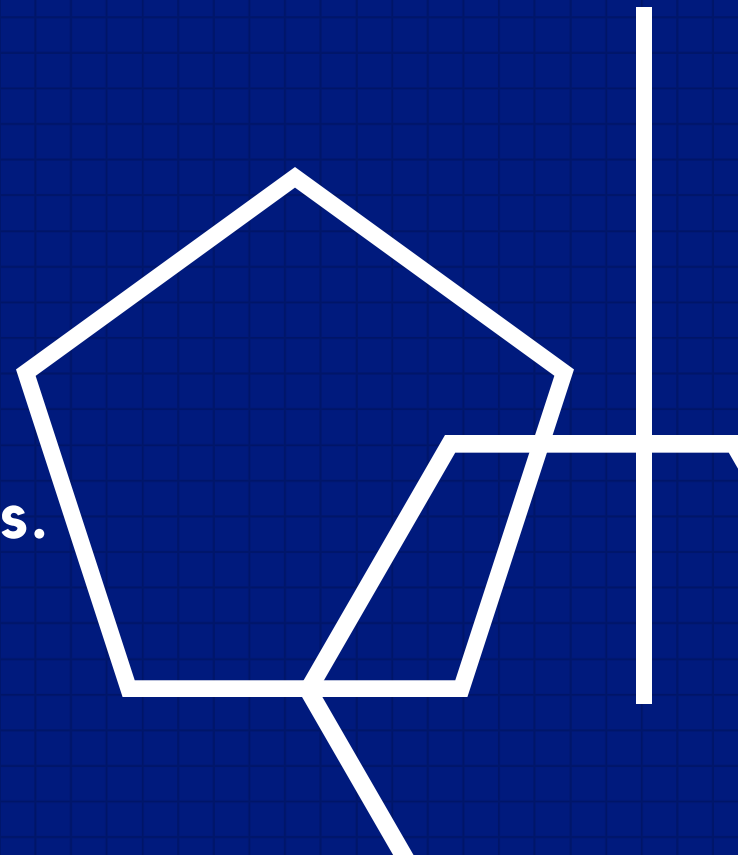
WHAT IS A ROBO-ADVISOR? (PART 1)

Robo-advisor is a service that uses highly specialized software to do the job of wealth managers or investment advisors – people who decide what type of investments you should be making and then tinker with those investments over time.



WHAT IS A ROBO-ADVISOR? (PART 2)

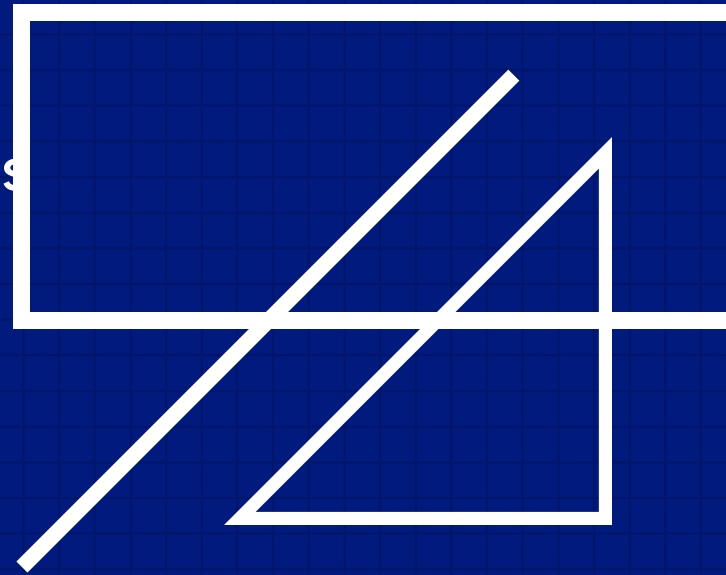
Robo-advisors typically have you, the investor, answer a few questions to determine your appetite for risk and then, through the use of proprietary algorithms, spread your money into appropriate investments, making adjustments as your situation and the market change. They typically collect **around 1% less in fees than a professional investment advisor.** Robo-advisors invest primarily in **ETFs.**

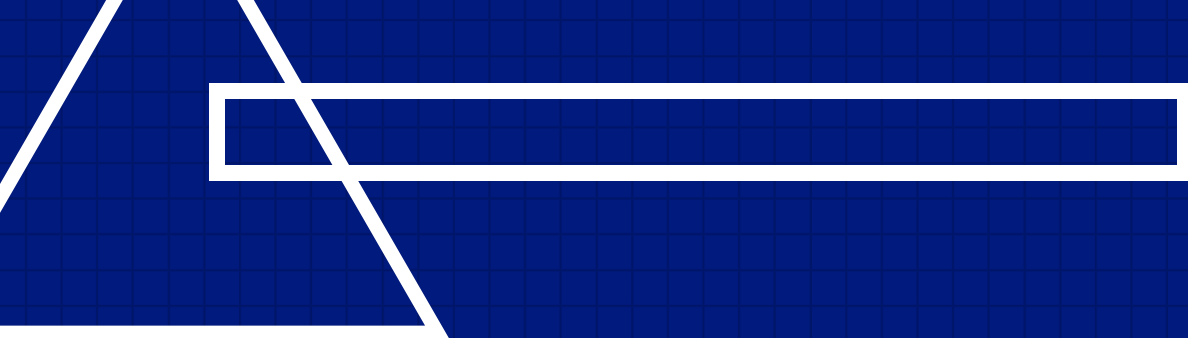


OVERVIEW (PART 1)

One of our clients decided to build **robo-advisor platform focusing on the United Arab Emirates, Saudi Arabia and India.**

After analysing market and working closely with the client on product specification, we decided to build **platform with the quiz** that allows users to understand what is the best way within minutes **to set up a customized, diverse portfolio** and receive an **access to wealth management services** previously reserved for the ultra-wealthy like **access to a certified financial planner.**





The platform handle virtually every aspect of investing. Once money is transferred to a new account and a stock/bond allocation chosen, the service handles everything from rebalancing to dividend reinvestment to even tax loss harvesting.

OVERVIEW (PART 2)



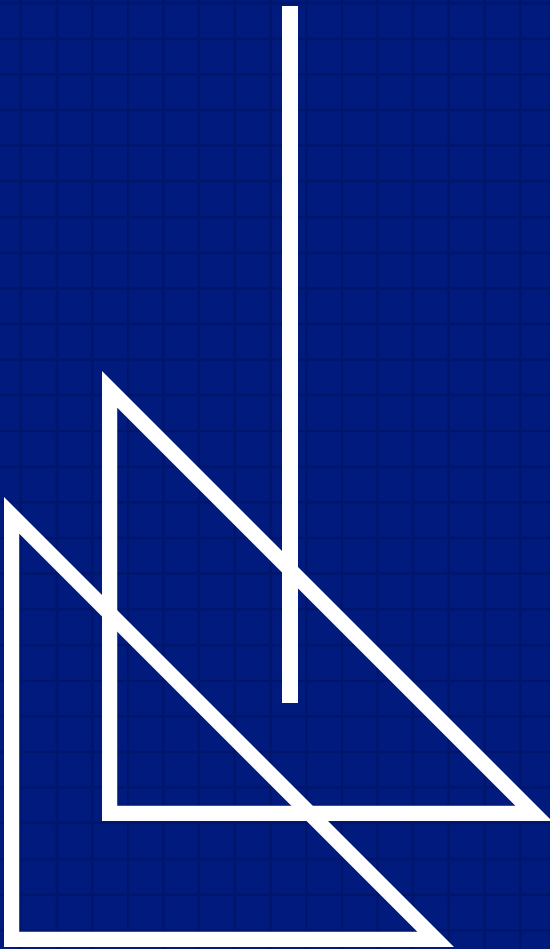
ADVANTAGES

The platform has two advantages.

The first is **lower fees.**

The second is the **24/7 accessibility and automation of robo-advisors.**

Since the companies operate entirely online, you can sign up, deposit money, check your balance, withdraw money, etc., **all without getting out of your pajamas.**





The platform makes smart investing
simple and affordable. Make one
smart decision today so

**Future You
is ready for
tomorrow.**



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HAVE A QUESTION? WRITE TO
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