

GAMBIT FINANCIAL SOLUTIONS

# Gambit

Company profile



[Gambit Financial Solutions](#) offers a comprehensive investment management solution.

« *By integrating the investment advisory with the portfolio management activities into one solution suite, **Gambit** can improve an organisation's business performance while minimising its exposure to reputation risk and litigation and significantly lowering the total cost of ownership.* »

[Gambit](#) also helps reduce costs by minimising the complexity of frequently monitoring and reporting a portfolio's performance and assessing the level of risks against the profile of investors.

To deliver first class value to our clients, we rely on advanced scientific research and development orchestrated around our partnership with prominent academics in Finance. Through our flagship solutions like Wealth**Expert**<sup>™</sup> and Folio**Master**<sup>™</sup> we deliver innovative solutions in investor

profiling, portfolio optimization, and risk management. We also help financial institutions to comply with new regulations like MiFID, the upcoming European Commission initiatives on UCITS IV and Packaged Retail Investment Products. Our solutions are easy to use, innovative and robust. At the core of our product development, we, at [Gambit](#), aim at keeping our solutions easy to understand and to use. Despite the increasing complexity of financial products and regulations we do not compromise on pragmatism.

PROFILE. OPTIMISE. COMPLY.

## WealthExpert™ & FolioMaster™

Our solutions interfaces are very intuitive and can be deployed seamlessly across organizations of various sizes. They produce analyses and reports that are clear, actionable and that can be discussed with clients and regulators alike.

We have established in depth relationships with our clients and have built strong scientific expertise in portfolio and risk management combining both in order to design innovative solutions like Wealth**Expert**™ and Folio**Master**™. They are constantly improved as we constantly engage with our client and regulators. Our Research & Development capability provides the shortest way from science to business.



Our solutions are comprehensive as they cater for all classes of asset and as they enable the end-to-end investment cycle.

Each solution has been developed with a specific focus on a market segment. They resist and adapt to quick and radical market changes. This makes them particularly robust and resilient. They offer to financial institutions better control on costs and reputation risk and demonstrate an accelerated Return on Investment.

Gambit solutions address challenges faced by many stakeholders in the industry. They strengthen the Financial Advisors capacity to build new or re-cement existing relationship with investors and enable Asset Managers to leverage their market expertise and differentiate from their peers through the delivery and the demonstration of optimal portfolio allocation. They also provide Risk Managers with better tools to monitor the compliance of their portfolios behaviour with their risk strategy.



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