
CROESUS DATA ANALYTICS

Gain deeper insights for smarter decision-making



Built for wealth management

Manipulating data has never been simpler. Croesus Data Analytics provides a dynamic visual interface for advisors, portfolio managers, branch managers, and executives to achieve an in-depth understanding of key business and portfolio metrics.

Data is often scattered across multiple sources, servers, and even spreadsheets. With Croesus Data Analytics, all the firm's critical information, including historical data, is available to decision makers to monitor business growth.

In one single platform, firms benefit from multiple views providing powerful firm-wide data for executives and crucial portfolio-level data for investment professionals. Wealth management firms can view, filter, sort, and compare large volumes of financial and non-financial data to provide actionable business intelligence at different levels of the organization.

Key features

Wide variety of
preconfigured metrics

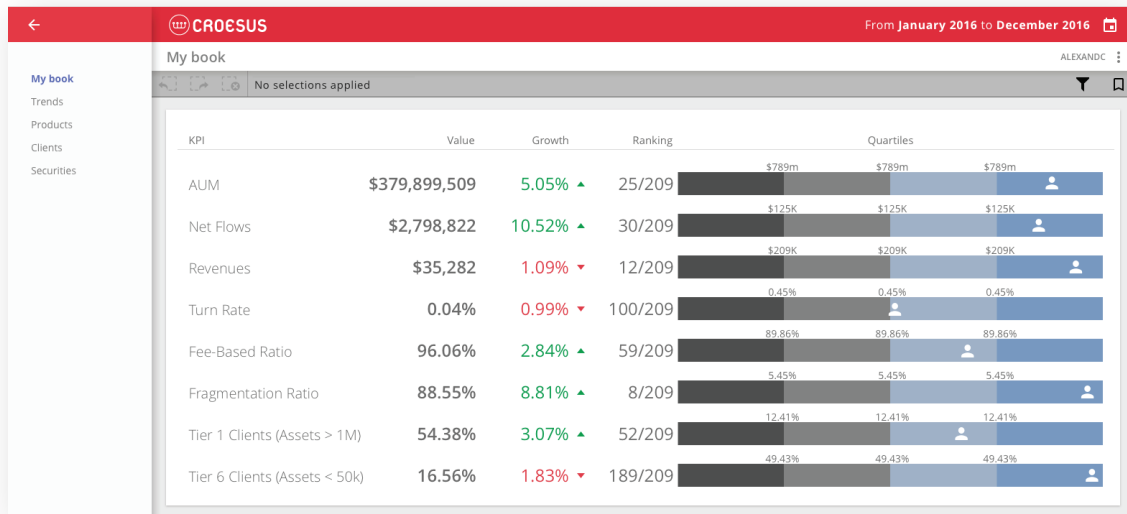
Extended filtering
options

Customizable features to
business needs

Intuitive and dynamic
interface

Multiple views adapted to
different user types

Personalized training
program

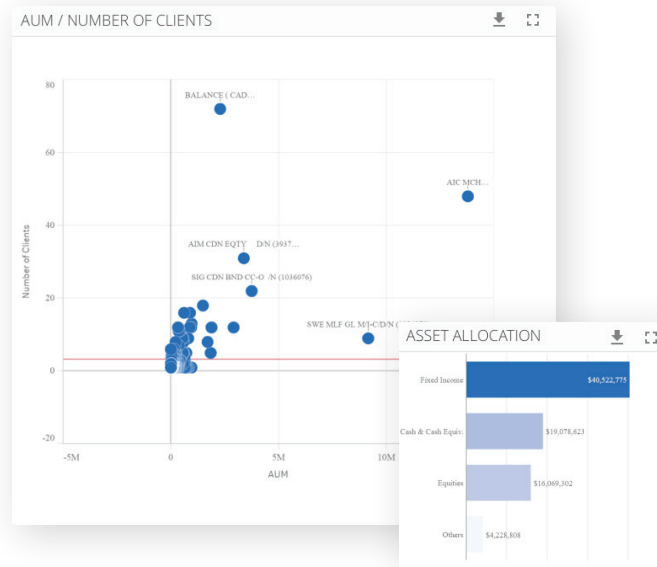


Analyze revenue and profitability

Croesus Data Analytics allows users to drill down into key sectors of a business based on a multitude of variables including client segments, demographics, and securities. Key performance indicators such as AUM, revenues, turn rates, and fee ratios can be viewed in a single screen. An instant view of the top-performing segments is also available. Advisors and firms can then shift their focus on activities that deliver the greatest business impact.

Manage risk

Which clients are in high-risk products? Are revenues being generated by one source? Answers to these questions can help mitigate risk and power a business strategy moving forward. Revenue data analysis can be made per client, per month, per advisor, or per branch, to provide a snapshot of factors impacting the bottom line. **Croesus Data Analytics** enables firms and advisors to elaborate strategies based on facts presented in a visual and intuitive format.



Identify opportunities

In a competitive environment, the ability to identify opportunities and then build and execute strategies is critical to business growth. **Croesus Data Analytics** provides insights and invaluable business intelligence so firms and advisors can zero in on opportunities and be more competitive. Key portfolio metrics can deliver a unique perspective, which then allows sales plans to be tailored to the segments that add value and move the needle.

About Croesus

Since 1987, Croesus has been providing sophisticated wealth management solutions to financial institutions throughout North America. Currently, 14,000 investment professionals use Croesus solutions to manage over \$1 trillion in assets. With its 180 dedicated employees, Croesus has built a reputation on the ability to efficiently transform data into information, develop portfolio management solutions to drive efficiency and deliver business intelligence for fact-based decision-making.



www.croesus.com