

FinfoxResearch

The Central Platform for Investment Research

FinfoxResearch is your central platform for **managing research content and instrument data** in investment advisory. Effortlessly create asset ratings, fact sheets, and sales stories – and distribute updates through newsletters, emails, or client notifications.

Streamline the **management of recommendation lists, model portfolios, and strategies** – fully integrated with core banking and asset management systems to guarantee consistent, up-to-date data.

Benefits with FinfoxResearch



Centralized Intelligence

All research content, instrument data, strategies and model portfolios – generated and managed in one place.



Smarter Investment Insights

Deliver timely, relevant updates across channels with ease and precision.

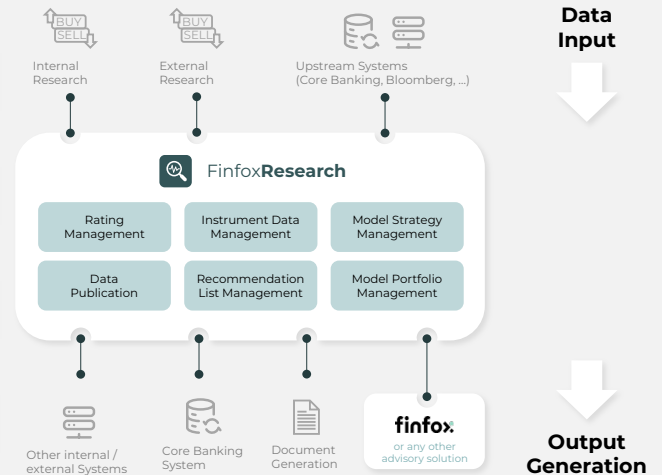


Coherent, Integrated Output

Turn research into action – across documents, investment campaigns, and digital advisory experiences.

Content & Output Management

- ✓ Centralized management of research content and instrument data
- ✓ Creation and publication of fact sheets and investment ratings
- ✓ Maintenance of model portfolios, strategies, and recommendation lists
- ✓ Comprehensive audit trail for all research content, changes, and outputs



Distribution & Integration

- ✓ Review and approval process
- ✓ Embedding research into advisory, reporting, and campaign processes
- ✓ Distribution of research updates via email, notifications, or API
- ✓ Providing data to downstream systems (e.g. e-banking, web portals)

91%
of our clients state that Finfox makes it easier and more reliable for them to comply with regulatory requirements.

What our clients say



"With the introduction of Finfox, we were able to significantly enhance both the quality and consistency of our advisory process. At the same time, we improved client deliverables and increased the implementation rate of our investment proposals. Finfox has been a reliable partner for many years."

Dr. Hanspeter Wohlwend
Head of Private Banking

Get in touch to learn more about the Finfox product suite

Uetlibergstrasse 134b · 8045 Zürich
+41 44 537 53 53 · info@finfox.ch
www.finfox.ch



Website