



VISUALIZING RISKS.

UNRISKOMEGA^{PROFILER}

THE SIMPLE SOLUTION FOR RISK PROFILING AND RISK
VISUALIZATION - TRANSPARENT, EFFICIENT, DIGITAL.



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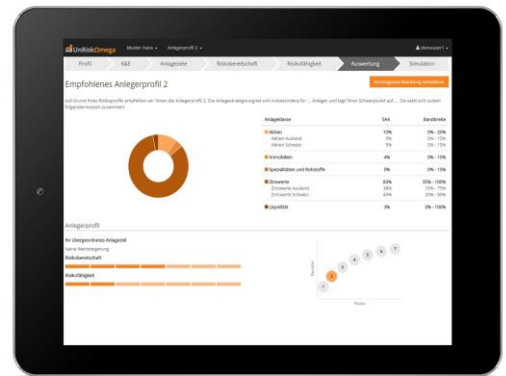
Digital Support to Achieve Regulatory Compliance

Regulatory Challenges

The upcoming regulatory requirements of FinSA and MiFID II will set the focus on client protection. The challenges for banks and independent asset managers are primarily to provide the client advisor with an efficient solution for risk profiling of clients and for transparent and comprehensible information on risks of proposed investments.

Flexibility and Multi-Channel Ability

With the UnRiskOmega^{Profiler}, client advisors receive a comprehensive solution for risk profiling of existing and potential clients as well as for information regarding risks associated with proposed investment strategies. The solution has a modular and service-oriented architecture and can be integrated easily into existing system landscapes. Furthermore, the solution can be provided over multiple channels and is device-independent. This allows client advisors to conduct the risk profiling directly in meetings together with the client, e.g. on a tablet, or it allows banks to provide the solution via a self-service portal directly to their end clients.



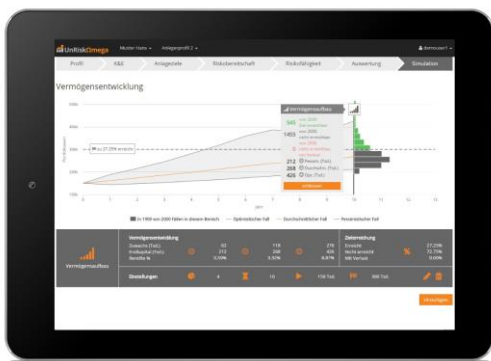
Visualization of Investment Strategies and Associated Risks

Simulation of Wealth Development

Beside risk profiling, the regulator requires the information of clients regarding the risks associated with the investments. The UnRiskOmega^{Profiler} therefore provides a simulation of the wealth development with the proposed investment strategy, which is based on the Monte Carlo method. The simulation allows the client advisor to define cash flows over the whole investment period as well as to integrate simulated crises, such as the recent financial crisis. By the simulation of multiple scenarios and investment strategies, the client will develop realistic expectations regarding the risks and opportunities of proposed investment strategies. This increases the clients' confidence in the financial institution and at the same time supports the client advisor in complying with the regulatory requirements.

Addressing Target Achievement

In order to address the complex world of investments in plain language, the solution focuses on the visualization of target achievement. Therefore, it allows to define different investment objectives based on wealth building or wealth attrition. The output is a simulation providing the client with the target achievement quota that could be reached with the proposed investment strategy. This enables client advisors to communicate the benefits and risks of strategies as well as to define the best fitting investment together with the client.



UnRiskOmega^{Profiler} – the Convincing Benefits

Client

Clients receive clear information regarding risk profile, investment strategy and target achievement.

Clients understand the opportunities and risks of recommended investment strategies.

Clients develop realistic expectations regarding the future development of their investments.

Client Advisors

Client advisors receive digital support for the visualization of different investment strategies.

Client advisors reduce their workload for preparation and follow up of client meetings.

By supporting the profiling process with digital solutions, banks and client advisors offer a new advisory experience and gain a decisive competitive advantage over competitors.

Bank / IAM

Banks and IAMs receive an extendable solution to comply with upcoming regulations like FinSA and MiFID II.

Banks and IAMs optimize the profiling process, increase their productivity and reduce advisory costs.

Interested in a live demonstration?

Simply contact us today.

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