



GROWWEALTH

ROBO-ADVISORY-AS-A-SERVICE

An investment journey made easy with a unique interface that understands customer's needs and aligns their goals with a portfolio that's within their budget and aligned to their risk tolerance.



Goal Based Journeys

Long term passive asset allocation solutions for emerging affluent



Risk Profiling

Risk appetite-based composite scoring methodology. Customisable.



e-Onboarding

Completely digital journey from customer onboarding to e-broker account opening



Thematic Investments

Short to mid-term strategies with quantitative & qualitative screening



Alerts, Notifications & Reports

Monthly performance, Performance status change, Funds transferred & Transactions History

Customised Solution

Deploy as an end- to-end solution (PAAS) or enterprise module. Multiple execution partners to expand your product offering.

Scalable Platform

Cloud based platform to service a growing customer base. Compliant to regulations across ASIA and The Middle East.

Cost Effective Implementation

Low costs with AUM based pricing vs fixed license cost. Unlimited product enhancements for upgrading the platform. Quick time-to-market.

Why GrowWealth?



GROWWEALTH

ROBO-ADVISORY-AS-A-SERVICE

for Retail Banks, Brokerage Firms, Insurance Companies, Asset Management Companies

Case study with a Top 3 Bank in Singapore

Bank's Challenges

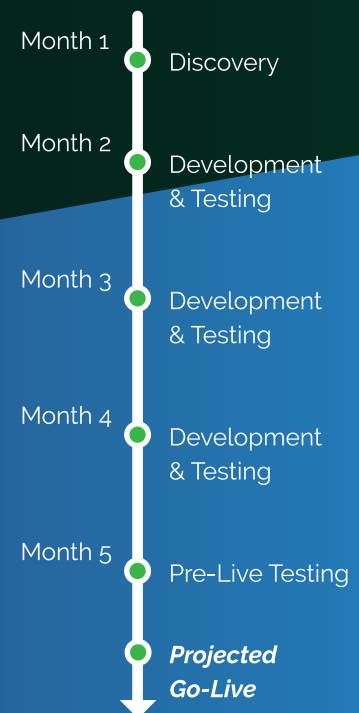
Limited digital wealth offering restricted to

- Few products: Bonds and UTs only
- Single instrument purchase only
- Transactional income limiting the revenue opportunity

WeInvest's Solution

- WeInvest enabled Bank to move from a transactional based model to an annuity based revenue model
- WeInvest, through the strategy market place, created portfolios of instruments investing in all asset classes
- Live in 5 months

Implementation timeline



WEINVEST

WeInvest is a trusted partner in digital wealth services - enabling financial institutions to service their clients better with innovative digital offerings.

www.weinvest.net

Email: sales@weinvest.net