

**AMS** Investor

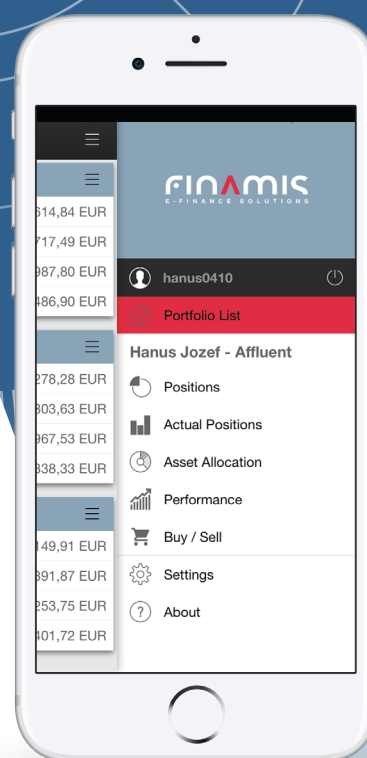


# Native mobile apps

Offer the clients of your investment services flexibility with AMS Investor.

- > Positions
- > Actual Positions
- > Asset Allocation
- > Performance
- > Buy/Sell

The application makes checking asset balances and trends a snap. With AMS Investor, portfolio owners can check market price fluctuations and adjust portfolio composition according to their preferences. The user environment is designed for ease of use, clear presentation of important information, and entering of orders to buy or sell securities. The product is ready for customisation for B2B clients and for modification according to your needs.





## Typical users

- > Clients of banks or investment companies that use investment services
- > Private bankers, financial advisors

## Advantages for end-user

- Clear overview of asset balances in a trendy application
- Immediate access to portfolio management
- Ability to submit buy and sell orders
- Increased interest in active asset management



## Overview of selected features

- Overview of multiple portfolios from one place
- Values assets in real time according to available market prices
- Displays actual and historical portfolio value and positions
- Offers portfolio performance graphs for custom time periods
- Overview of capital allocations according to investment baskets
- Buy and sell securities
- The application offers two levels of access:
  - passive: overview of the portfolio balance and trends
  - active: adds ability to trade securities from the app
- Native apps for Android and iOS