The Portfolio Analytics Module.

Intelligent Investment Infrastructure

Most investment conversations start without the right analysis.
That changes now.

4→1

Four meetings into one conversation.
The Portfolio Analytics Module was built to make that possible.

Your best salespeople walk in underprepared.

INSTEAD THEY ARE:

- Waiting days on a solutions team
- Building analysis with no client context
- Walking in blind to portfolio risks
- Guessing which products fit — and wrong
- Losing the room to a better-prepared rival

The result: 20–30% of the week is actual selling.

With the right analysis, you can walk into the meeting and say: here is what this portfolio needs. That changes everything.

HEAD OF SALES · GLOBAL ASSET MANAGER

20+ years in asset management distribution

This is the conversation that shaped the Portfolio Analytics Module.

Six Steps.
One Workflow.

From portfolio upload to client-ready output. Fully integrated.

01

Portfolio Input

Upload any portfolio. Holdings identified, asset classes mapped, gaps flagged. No reformatting required.

02

Instant Analysis

Expected return, risk profile, attribution, scenario testing grounded in capital market assumptions. Minutes, not days.

03

Live Scenario Testing

Adjust assumptions, stress-test allocations and explore alternatives in real time. In the meeting, in the room.

04

Client Targeting

Identify which clients this analysis is most relevant for. Scored by relevance, risk profile and relationship tier.

05

Comms Profiling

Quantitative psycholinguistic analysis profiles how each client communicates. Pitch built in their voice, not yours.

06

Presentation Output

Client-ready materials for each meeting. Talking points, positioning, narrative: ready before the week begins.

Knowing who to call is half the challenge.

Knowing how to talk to them is the other half.

The Portfolio Analytics Module profiles every target firm using quantitative psycholinguistic analysis: the science of how language reveals how people think, decide and communicate.

THE FAILURE MODE THIS SOLVES:

Right product. Right timing. Wrong pitch. The room goes cold.

THE PROFILE REVEALS:

Expected return vs. objective

Is the portfolio on track for what this client needs?

Risk & scenario analysis

Stress-tested before the meeting, not during it.

Performance attribution

What is driving returns. What is dragging them.

Optimised alternatives

A better portfolio under the client's own constraints.

Plain-English narrative

Every output explained without jargon.

The analysis is then built around their portfolio. Not a generic report.

"Investment conversations should be driven by your capital market views. Right now, they often aren't."

HEAD OF PRODUCT · BOUTIQUE ASSET MANAGER

15+ years in asset management product development

What the Portfolio Analytics Module stops:

- ✕ Launching without validated demand
- ✓ **See real client need before committing to development**
- ✕ Roadmaps built on the loudest voice
- ✓ **Replace anecdote with cross-market evidence**
- ✕ Misaligned positioning at launch
- ✓ **Know which segment, vehicle and message before go-live**

Most sales intelligence tools CRM · data subscriptions · flow databases	Three Horizons Portfolio Analytics Built end-to-end for investment distribution
✕ Requires a quant or solutions team to operate	✓ **Conversational — no specialist required**
✕ Days to produce meaningful output	✓ **Minutes from portfolio upload to full analysis**
✕ Static reports, no live adjustment	✓ **Adjust assumptions and constraints in the room**
✕ Generic benchmarks, no client context	✓ **Analysis built around each client's actual holdings**
✕ Disconnected from distribution workflow	✓ **Feeds directly into sales enablement and product strategy**

Built by investment and distribution professionals who lived this problem. Not designed in. Built from the field.

Ready to see it?

The Portfolio Analytics Module is not a brochure.
It is a live, working system.

One hour.

The output speaks for itself.

1 Hour	800+	End-to-end
to replicate a week of research	advisors profiled globally	trend to pitch, one workflow

Request a Demonstration

We work with a small number of firms where the fit is right.

The Portfolio Analytics Module is one of three integrated modules available through the Three Horizons platform.

www.threehorizonscapital.com