

## Single Strategy Mapped Service

### The problem

Financial Advisers and Wealth Planners use Dynamic Planner to build suitable investment solutions for clients either by using single strategy funds in their Centralised Investment Propositions or in conjunction with existing Multi Asset solutions. While Multi Asset solutions are rigorously analysed to calculate their risk profile to ensure suitability for clients, single strategy funds are not subject to the same level of due diligence. As data for these solutions are received at an asset allocation level from third party vendors, Dynamic Planner cannot validate the efficacy of these classifications, and hence the quality of the data. Using this data as an input to calculate risk of investment solution of which these single strategy funds are a part of, therefore could lead to inaccuracies.

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### The answer

To address the above mentioned issues, Dynamic Planner has launched the Single Strategy Mapped Service. As part of this service, Dynamic Planner will collect the holdings data for the single strategy funds directly from the provider of the solution. This will ensure accuracy of the data.

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### The Dynamic Planner solution

The team at Dynamic Planner will ensure the underlying holdings data received from the provider is correctly allocated to an accurate combination of the 72 asset classes used to profile solutions for Risk Profiling Service. This, in turn, will be reflected in the software and identified by a new badge so Wealth Managers and users of the Dynamic Planner software can have confidence when using those single strategy funds as part of a client's overall portfolio. This ensures accuracy in the estimation of risk, given the enhanced quality of data, and assures the suitability of the investment solution proposed by the wealth manager.

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### How does Dynamic Planner achieve this?

Although the single strategy funds are not risk profiled in their own right, the fact they are accurately represented in their proper asset classes through a transparent verification of the underlying holdings implies that, when used as part of a portfolio, the software will pull through the underlying assets of all the component parts of the portfolio and give an accurate risk grade on Dynamic Planner scale of 1 to 10.

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