

# Investment solutions research

## The problem

So much available information about the performance of a fund relates to the unit price on the day the information is viewed. This can give an incomplete or inaccurate impression, and does not take into account all of the factors that need to be considered to determine suitability.

## The solution

Dynamic Planner's investment solutions research summarises the key factors into an easily identifiable logo that can be used to filter the retail investment market into a manageable shortlist. Our research constantly analyses the total retail investment market without bias or restriction, and publishes its conclusion in the form of either a Premium or Select rating. The ratings are updated quarterly based entirely on merit and fact. No manager pays to be included in the service, but some fund managers pay for the data and conclusions to be published in a report available in Dynamic Planner. The research is based on a four-factor quantitative model:



## How will firms' clients benefit?

Clients are less likely to inadvertently invest in assets that have just gone up and can be reassured by the Premium / Select logo that their adviser has third party validation for the fund selection. Clients can be confident that the process to accredit the fund was entirely unbiased and in their best interests.