Think LOGICLY

Portfolio Coach & Custom Indexing

PERSONALIZED PORTFOLIOS FOR EACH CLIENT

Portfolio Coach™ gives financial advisors and RIAs a competitive edge with smart, time-saving technology that simplifies and automates portfolio management.

Do More, Faster with Portfolio Coach

- Tax-aware portfolio rebalancing
- Real-time monitoring & alerting increases client touch points
- Seamless custodian integration
- Portfolio alerts for ESG and more
- Custom benchmarking and direct indexing
- Link IPS to client accounts at custodian
- Active trade recommendations
- Research and back test
- Compliance audit trails

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Savvy clients want customization and flexibility. Give it to them by offering Custom Indexing (CI) from LOGICLY.

CI skips the fund manager, giving investors the opportunity to be more selective than ever about what goes into their portfolio at a lower cost. Custom Indexing is driven by our advanced, low-cost technology. At LOGICLY, we view ETFs as the building blocks of portfolios that CI can't yet replace.

Portfolio Coach uses a hybrid approach that includes global mutual funds, ETFs, and stocks in client portfolios. Portfolio Coach is an independent data and technology solution that addresses today's market needs, with the flexibility to meet future data and benchmarking demands. It simplifies the ability to set a Custom Index by overlaying data on a portfolio.

Financial advisors can set a client's benchmark using a model portfolio or index to find:

- Dividend Income opportunities
- ESG ideas that meet a client's personal Environmental, Social, or Governance views
- Risk-appropriate investments in line with each client's risk appetite
- Tax-aware strategies
- Tactical trading concepts for strategies including options overwrite, inflation hedges, and thematic shifts