

CIMALGO Analytics

Intelligence For Asset Managers

About Cimalgo

CIMalgo (www.cimalgo.com) is a global asset allocation and risk management platform provider. CIMalgo offers technological analytics tools, powered by high-quality data, for professional investors of all levels to make better investment decisions. We believe investors can and should be in complete control of their own investment process, from start to finish.

Cimalgo Analytics

CIMalgo Analytics integrates high quality data and investment management tools in an organized format, with a special focus on global asset allocation and risk management of investment opportunities. The principals of CIMalgo bring decades of industry experience from the field of asset management, risk management, investment research, proprietary trading, hedge funds and data science, from companies such as Goldman Sachs, Deutsche Bank, GAM, UBS and Macrobond.

The afore-mentioned pedigree together with technological advancement gives CIMalgo the opportunity to offer, what was previously privy to the elite investors, a powerful tool for any professional with a vested interest in asset management, at a low cost.

Unlocking 3 powerful investment tools in 1 application

We have structured a workflow where the user can work seamlessly with

- ✓ Global Asset Selection
- ✓ Asset Allocation
- ✓ Risk Management



For

- ✓ Portfolio Managers
- ✓ Risk Managers
- ✓ Research Analysts



Supported Assets

- ✓ Global Equities
- ✓ Global ETF:s
- ✓ Indices
- ✓ Currencies



Access

- ✓ Web - based SaaS
- ✓ No integration, no installation
- ✓ License fee - based

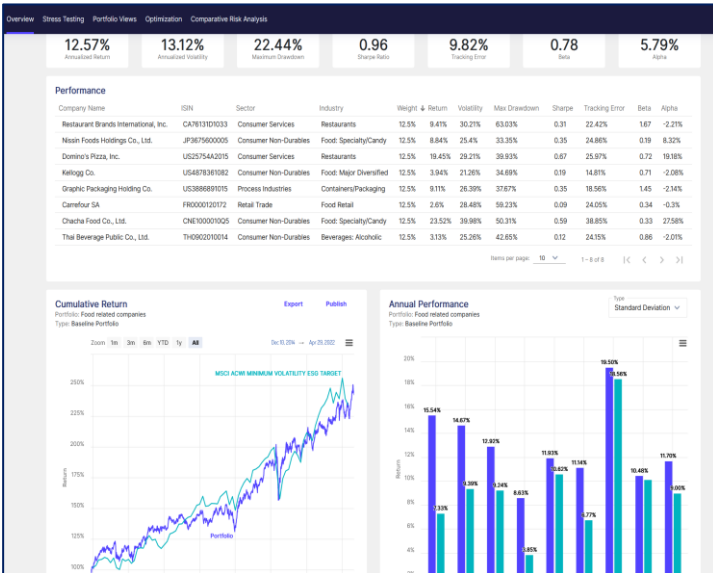
Name	Industry	Company ESG	Equity Buyback Ratio
Apple, Inc.	Telecommunications Equipment	A	3.45
Microsoft Corp.	Packaged Software	AAA	1.36
Amazon.com, Inc.	Internet Retail	BBB	0.16
Alphabet, Inc.	Internet Software/Services	BBB	3.05
Meta Platforms, Inc.	Internet Software/Services	B	5.84
Tencent Holdings Ltd.	Internet Software/Services	BBB	0.1
Tesla, Inc.	Motor Vehicles	A	-0.09
Berkshire Hathaway, Inc.	Multi-Line Insurance	BB	3.62
Taiwan Semiconductor Manuf...	Semiconductors	AAA	0.01
Visa, Inc.	Finance/Rental/Leasing	A	2.57
Samsung Electronics Co., Ltd.	Telecommunications Equipment	A	0
Johnson & Johnson	Pharmaceuticals: Major	BBB	0.56
Walmart, Inc.	Food Retail	BBB	2.46
Kweichow Moutai Co., Ltd.	Beverages: Alcoholic	CCC	0
JPMorgan Chase & Co.	Major Banks	A	3.25
Mastercard, Inc.	Finance/Rental/Leasing	A	1.96
UnitedHealth Group, Inc.	Managed Health Care	BB	1.07

Global Asset Selection

The platform comes with integrated data from top providers such as FactSet, MSCI and S&P. Select your global assets intuitively with powerful filters to easily base a selection from hundreds of quantitative and qualitative data sets to create a relevant, top down or bottom up driven, universe for your asset allocation.

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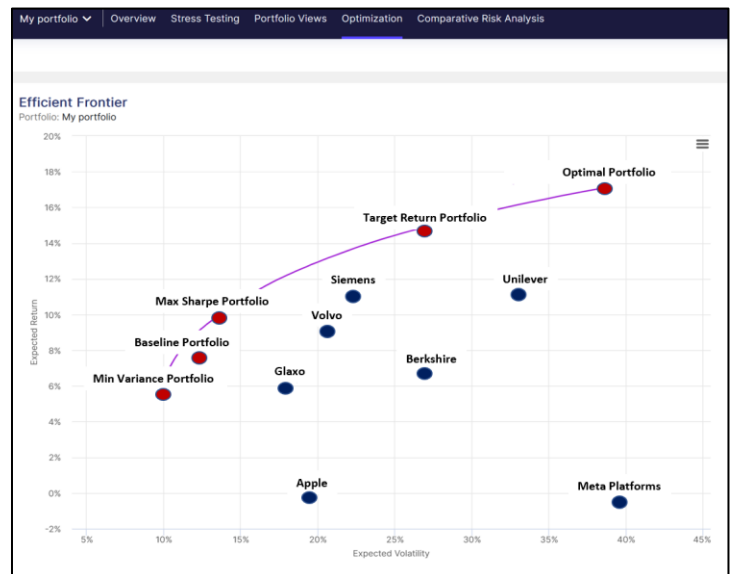
Asset Allocation

The platform offers well known asset allocation and optimization methods based on the universally acclaimed research from Nobel laureates such as Sharpe and Markowitz as well as the ground breaking asset allocation models from Black and Litterman, who defined the Goldman Sachs asset allocation framework.

If you want to integrate your own models, the platform can easily allow for this, giving you the flexibility to allocate assets by combining top research with your own ideas.

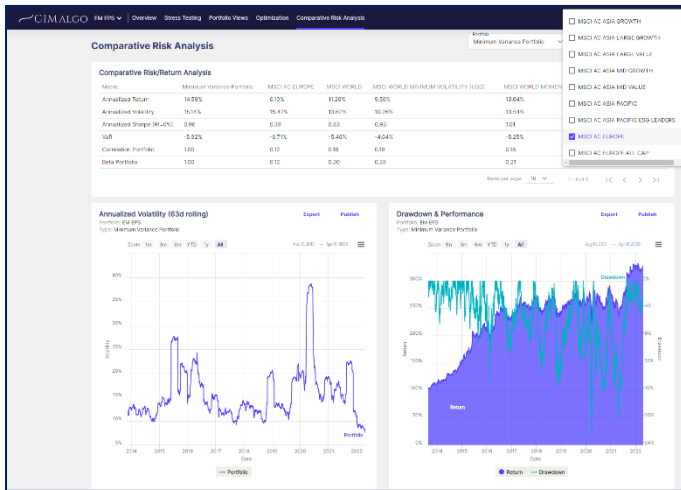
Optimization

An integral part of portfolio construction is the portfolio optimization process for specific goals, constraints or regulatory requirements. Our integrated optimizer allows you to do multi-portfolio optimizations depending on the historical or future views of your portfolio.



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Risk Management

You can visualise and assess your inherent portfolio risks from a top down or bottom up point of view to analyse your asset allocation and exposure given your mandate and investment scope.

The comparative risk report as well as the portfolio overview, allows you to pull the generated charts for your own reporting or share your portfolio in the integrated user management system for a collaborative approach with colleagues and clients.

Platform Resources

Data

- FactSet Equity price data + Fundamental, Quantitative, Descriptive Data on 15 000+ companies
- 3000+ multi asset class ETF data
- MSCI global indices
- MSCI ESG Ratings
- MSCI ESG Company Data
- S&P Credit Ratings

Software

- Web based SaaS
- Updated daily
- No code editing
- All data fields are integrated
- All functions are integrated
- Integrated user management
- 2 fa Authentication

Functionality

- Global Asset Selection - Filter based security screener
- Asset Analytics
- Asset Allocation – Portfolio creator and back-testing engine with full historical reporting
- Risk management
- Conditional optimizer
- Comparative risk reporting

Contact, Support, and Licensing

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