



ITI Data
Vision

Introducing the Selftrade ETF Hunter





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Change is coming to the way our investments are managed:

- The rise of the individual – we are on our own Deloitte
- Increasingly investors want a defined outcome Deloitte
- Millennials are expected to control over \$24 trillion by 2020
PWC

Technology will help deliver the ‘free investment lunches’:

Diversification

Compounding Returns

And help to minimize the ‘rotten apples’:

Losses

Costs

Today we are going to focus on Costs



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Costs are the biggest impediment to securing a successful outcome

- Each year UK investors pay more than £12 billion in fees on the £870 billion they have invested in OEICS and Unit Trusts
- Total fees of 1.5% p.a. can consume over 50% of everything made over the lifetime of an investment
- In the US, financial advisors now have an explicit legal duty to regularly (every 3 months) review the costs incurred by their clients and substantiate that they are 'reasonable'

But how to transfer the £870 billion from expensive funds held on expensive platforms to low cost ETFs?



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Introducing the:

Selftrade



ETF Hunter
For the wise investor



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Best way to demonstrate the ETF Hunter is to move to a live demo.



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What next for the ETF Hunter?



In plan

- Portfolio analytics
- Diversification analysis
- Portfolio builder
- Account aggregation
- Recommendation report
- Intelligent Search
- Intra-day bid/offer prices
- ETF vs ETF
- ETF vs Mutual Fund