

# NEWS

For Immediate Release

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## **Kwanti Announces New Screener Feature to Help Financial Advisors Discover Best Performing Assets**

*Screener assists investment managers in finding the right  
investment opportunities for clients*

**SAN FRANCISCO, CA (January 25, 2023)** – [Kwanti](#), a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and much more, recently announced the release of Kwanti Screener, a new feature that allows advisors to screen for best performing assets and find the right investment opportunities for clients, saving them time in the process.

"Screener reveals best performing assets in seconds, sifting through millions of risk, performance, and allocation data points," said Christophe Gauthron, CFA®, Founder and CEO of Kwanti. "Advisors using Kwanti's powerful analytics can now make even better investment decisions for their client's portfolios."

Kwanti users now have the ability to search ETFs, mutual funds, SMAs, and individual stocks and narrow the list down based on specific criteria of their choosing. With just a few clicks, advisors can view a filtered down list of the best performing assets via Kwanti's intuitive, user-friendly interface, which includes hundreds of thousands of securities and their data points.

### **COMBINING POWERFUL ANALYTICS AND PROPOSAL GENERATION TO OPTIMIZE TIME AND RESOURCES**

Kwanti delivers portfolio analytics, stress testing, and proposals for advisors and investment professionals, assisting with prospect conversion, client acquisition and retention, and model management. The web-based software and fintech solution allows advisors to balance serving clients well and managing portfolios with data-driven expertise.

Users can elegantly showcase portfolio recommendations to centrally position themselves in client relationships and close business with prospects, as well as leverage data integrations with leading custodians and portfolio management platforms to streamline the client management process. Kwanti’s integration partners include Pershing, Schwab, TD Ameritrade Institutional, Fidelity, Advyzon, Orion, Redtail, Black Diamond, WisdomTree, BlackRock, State Street, Riskalyze, TradePMR, Addepar, Folio Institutional, and more.

Kwanti offers a free 30-day trial, with no software to install and all features available during the trial. Financial advisors and other interested parties can [click here to sign up for the free trial](#) or [click here to watch a demo](#).

## **SEARCH FOR SIMILAR ASSETS AND EXPORT RESULTS**

In addition to filtering and screening for best performing assets based on criteria of their choosing, Kwanti users can use Screener to search for similar assets. Advisors can search for any asset and Kwanti will filter down a list of similar assets for them to review, and they can then save searches for future uses. Saved Searches will remember all of the pre-selected criteria, column selections, and sorting preferences.

Once the user has filtered down the results, they can take their analysis one step further by comparing up to four assets in the Asset Profile. They can also export their list of results to an Excel spreadsheet for additional analysis outside of Kwanti.

“We have used Kwanti's Screener feature extensively to navigate the thousands of investment options advisors must sift through in order to build portfolios tailored to their clients’ needs, as well as to their own respective investment management styles,” said Matt Smith, CFA®, CFP®, CIMA®, CAIA®, Founder of Concert Financial Planning. “Used in concert with Kwanti's array of features and tools, we can go deeper into the portfolio construction and analysis process in a much more intuitive and simplified way than we could with other services that were also substantially more costly.”

Kwanti Screener is now available to both new and current users at no cost. To learn more about Screener, [please click here to visit the Kwanti blog](#). To see full documentation and a “how-to” video for using Screener, [please click here for a full tutorial](#).

## **ABOUT KWANTI**

Founded by Christophe Gauthron, CFA®, and based in San Francisco, California, Kwanti is a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources. To learn more about Kwanti, visit [www.Kwanti.com](http://www.Kwanti.com).

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