

NEWS

For Immediate Release

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Kwanti Announces New Cash Flow and Watchlist Tools, Teases AI-Powered Features for 2026

Leading portfolio analytics platform introduces game-changing new features and shares 2026 roadmap

SAN FRANCISCO, CA (March 10, 2026) – [Kwanti](#), a leading portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, proposal generation, and more, today announced multiple new features to its award-winning portfolio analytics platform that bring significant capabilities to how advisors model cash flow and monitor portfolios.

KWANTI LAUNCHES NEW CASH FLOW SCENARIOS FEATURE

Kwanti's new [Cash Flow Scenarios](#) feature enables advisors to run historical simulations showing how a portfolio would have responded to systematic cash flows over time. Instead of relying on projected returns, advisors can show clients exactly how different withdrawal and contribution strategies would have played out using actual market data, making for more confident conversations around retirement income, dollar cost averaging, and portfolio sustainability.

“Advisors have always needed a better way to show clients how different strategies would actually perform in the real world,” said **Christophe Gauthron, CFA®**, Founder and CEO of Kwanti. “With Cash Flow Scenarios, we’re giving advisors the ability to have more evidence-based conversations grounded in real market history.”

Four distinct scenario types can be tested: Dividend Withdrawal, Fixed Dollar Withdrawal, Percentage-Based Withdrawal, and Fixed Dollar Contribution.

Cash Flow Scenarios is now available to all Kwanti users. To learn more, [please click here](#).

KWANTI INTRODUCES WATCHLIST: STREAMLINED SECURITY MONITORING

Kwanti also recently released [Watchlist](#), a dedicated workspace that gives advisors a single place to monitor securities, track opportunities, and stay on top of market movement without jumping between tools. Advisors can organize securities into multiple lists, customize their view, and set automated price alerts to keep their focus on what matters most.

“Advisors shouldn't have to juggle multiple tools just to stay on top of the market,” said Gauthron. “Watchlist brings everything into one place so advisors can monitor securities, track opportunities, and act quickly without breaking their workflow.”

Key features include customizable display, flexible import options, automated price alerts, and multiple Watchlists.

Watchlist is now available to all Kwanti users. To learn more, [please click here](#).

KWANTI'S 2026 ROADMAP AND UPCOMING AI-POWERED FEATURES

While Kwanti has always brought practical, high-value tools to financial advisors, the company is now focused on a new frontier: bringing the power of AI to portfolio analytics. With deep, cross-custodian data built up over years of real advisor use, Kwanti serves as the source of truth that powers these capabilities, ensuring AI-generated insights are grounded in real portfolio data rather than what an advisor can remember to describe.

Kwanti is actively developing AI-powered features that allow advisors to surface insights faster, ask questions in natural language, and get a clearer picture of their practice without leaving the tools they already use. This includes integrating Kwanti's data with leading AI platforms through the Model Context Protocol (MCP).

The Kwanti team will be sharing more details and providing hands-on demonstrations at the [2026 T3 Technology Conference](#), including during a breakout session titled “From Data Fatigue to Client Confidence: Prospecting with AI” on Thursday, March 12th at 9:30am CT. Additional details will be announced in the coming months.

To stay up to date on all new features and enhancements to the Kwanti platform, tune in to the [Kwanti blog](#) and follow [Kwanti on LinkedIn](#).

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, visit www.Kwanti.com.

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