

NEWS

For Immediate Release

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Kwanti Named Best Investment Data/Analytics Tool in 2023 Advisor Software Survey from T3 Technology Tools for Today and Inside Information

In addition, portfolio analytics solution also scores high marks as an Economic Analysis & Stress-Testing Tool

SAN FRANCISCO, CA (April 11, 2023) – [Kwanti](#), a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, recently achieved high client satisfaction ratings and showed significant increase in market share across multiple categories in the [2023 T3 / Inside Information Software Survey](#) – including earning the highest rating in the Investment Data/Analytics Tools category, as well as the highest rating in the Economic Analysis & Stress-Testing Tools category for firms with more than 0.4% market share.

The results of the annual technology survey and report, produced by [Joel Bruckenstein of T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#), were unveiled and presented live at the recent [T3 Advisor Conference](#), which took place March 13th – 16th in Tampa, Florida and saw nearly 1,000 total attendees. The survey is one of the most widely respected and referenced attempts to quantify what technology advisors are using, what they want to see more of, and which solutions they like best. Technology firms are ranked based solely on advisor input.

“We’re very proud to achieve high ratings in this industry-leading survey and report yet again,” said Christophe Gauthron, Founder and CEO of Kwanti. “We love hearing that our clients are highly satisfied with our platform and solutions, and it’s exciting to see our continued growth in market share within the industry. These results confirm what we hear from the advisors who subscribe to our system every day.”

AMONG THE BEST OVERALL RATINGS IN THE SURVEY

The report noted that Kwanti’s top rating in the Investment Data/Analytics Tools category was among the best overall ratings in the entire survey.

The report dubbed client satisfaction ratings higher than 8 “remarkable” in its summary findings:

- Kwanti received the highest client satisfaction rating (8.57) in the Investment Data/Analytics Tools category – an increase from 8.52 in 2022. Their market share also increased from 5.01% to 5.53%, good for fourth overall.
- Kwanti scored the highest client satisfaction rating (8.41) in the Economic Analysis & Stress-Testing Tools category for firms with more than 0.4% market share (within the top 13 firms). Their market share increased from 3.80% to 4.41%, good for fourth overall.
- Kwanti was also named often in ‘Programs Respondents Are Considering’ within these categories.

Thanks to their outstanding ratings, the report dubbed Kwanti a “Software All Star”, recognizing solutions that finished in the top five of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating. Only three other firms besides Kwanti qualified for the “Software All Star” list more than once.

“I think we continually achieve top marks year after year because we have always and will continue to approach development and innovation with an advisor-first mindset,” said Gauthron. “While many software solutions will talk about how much they listen to advisor requests, we follow through and put the most asked-for items into action.”

To see the full T3 / Inside Information Software Survey results, [please click here](#).

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.

One of the main reasons Kwanti has attended the T3 Conference for the last ten years is to interact and connect with their many integration partners, which include Pershing, Schwab, TD Ameritrade Institutional, Fidelity, Advyzo, Orion, Redtail, Black Diamond, WisdomTree, BlackRock, State Street, Riskalyze, TradePMR, Addepar, Folio Institutional, and more.

In addition, Gauthron was a highly sought-after thought leader at this year’s conference, participating in interviews with [Action! Magazine](#), [T3 Tech Hub](#), the [Swift Cam](#) Conference Video series, and the conference podcast compilation episode, where he discussed what keeps Kwanti coming back to the T3 Conference, their stellar survey ratings, the importance of engaging with integration partners, difficulties facing the industry, his conference experience, 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](#).

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.

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