FORTUNE WEALTH

Your success defines Our success

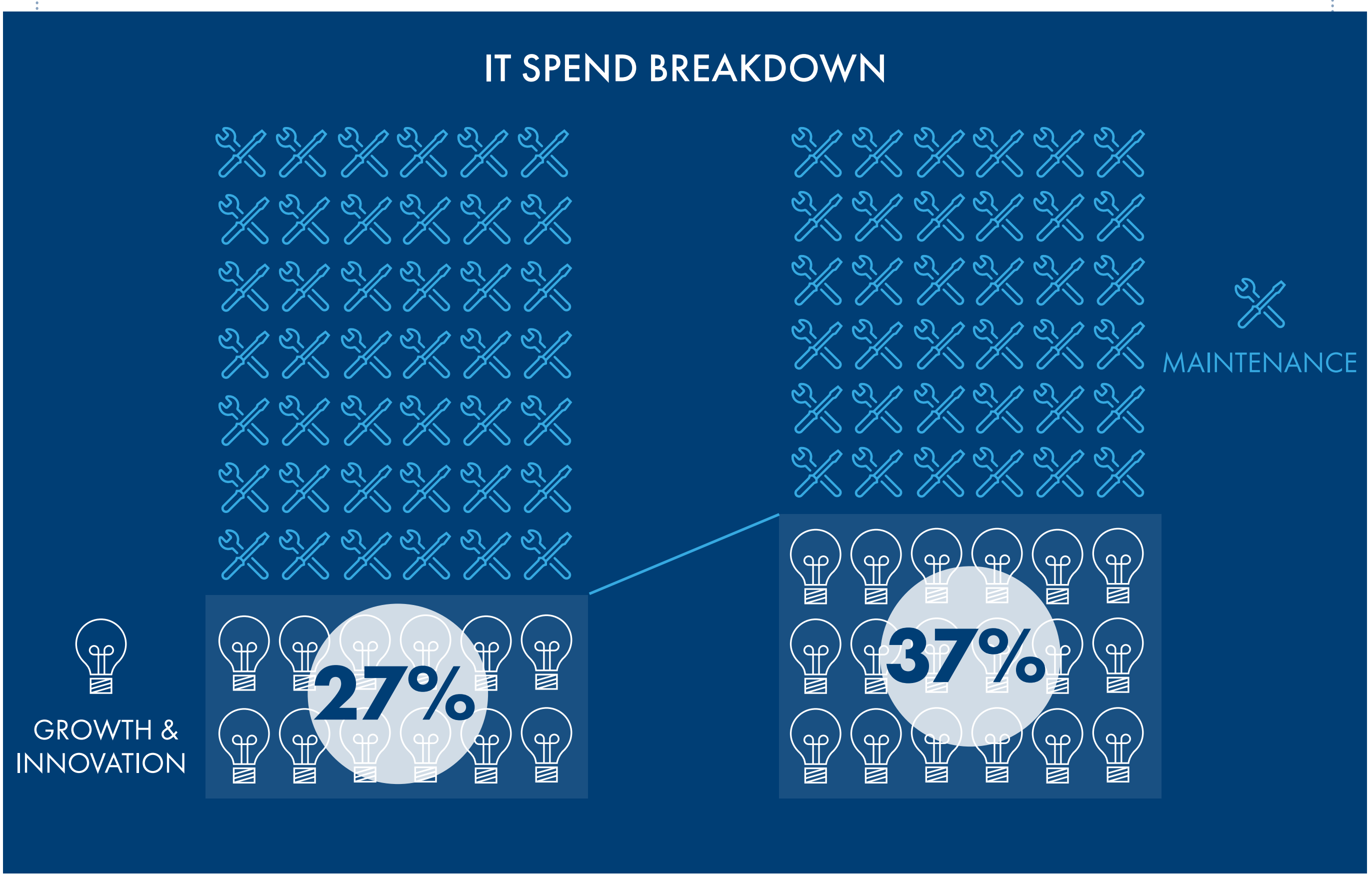
Fortune Wealth is the leading solution used by top individual investors and private financial institutions. Built to suit organizations of all sizes, it enables firms to deliver highly personalized services and focus on clients' satisfaction, with sophisticated features for advisors and portfolio managers, backed by robust automation at the back-office.

Fortune Wealth covers all the front-to-back needs of a modern WM firm, from digital wealth to CRM to portfolio management, securities and core processing, market data management, analytics, AI and more. Its modular design enables you to implement the components you need, according to your business and IT requirements, on premise, in the cloud, or as-a-service.

FORTUNE WEALTH CUSTOMERS SPEND MORE ON INNOVATION

Financial institutions understand the importance of investing in IT. However, the greater part of this investment is usually dedicated to maintaining[1] existing infrastructure and applications.

> Customers of our wealth solutions spend on average **37%** of their IT budgets on growth and innovation[2] vs. a market average of only 27%[3].



1. Maintenance includes existing business and non-discretionary regulation
2. Fortune Value Benchmark
3. 2018 Global average IT spend by banks in new investments. Source: Celent 2019

How we Address your Goals and Challenges?

Managing investment portfolios is more demanding than ever. Wealth management professionals require state-of-the-art portfolio analysis. They want to instantly retrieve, display and analyze positions while on the phone with their clients. They want the ability to calculate exposure and detailed analysis. They need the flexibility to aggregate accounts any way they want. They want highly reliable data and assistance from AI so that they can make informed investment decisions to maximize investment performance.

All of this must be supported by streamlined back-office processes with the highest levels of automation, scalability, resilience and security. Operations and IT costs must remain under control even as the business expands and regulations are ever more stringent.

Our suite of products was designed from the onset to address these goals. Each individual best-of-breed product helps firms leverage technology to offer better service while protecting margins. And whereas some firms must invest heavily to integrate different products and technologies, Fortune Wealth is deployed as an integrated solution.

To cover various jurisdictions and regulatory requirements, Fortune Wealth offers pre-defined country model banks across the full value chain. That reduces the go-to-market effort drastically. Fortune Wealth provides seamless end-to-end workflows resulting in lower costs and higher efficiency.

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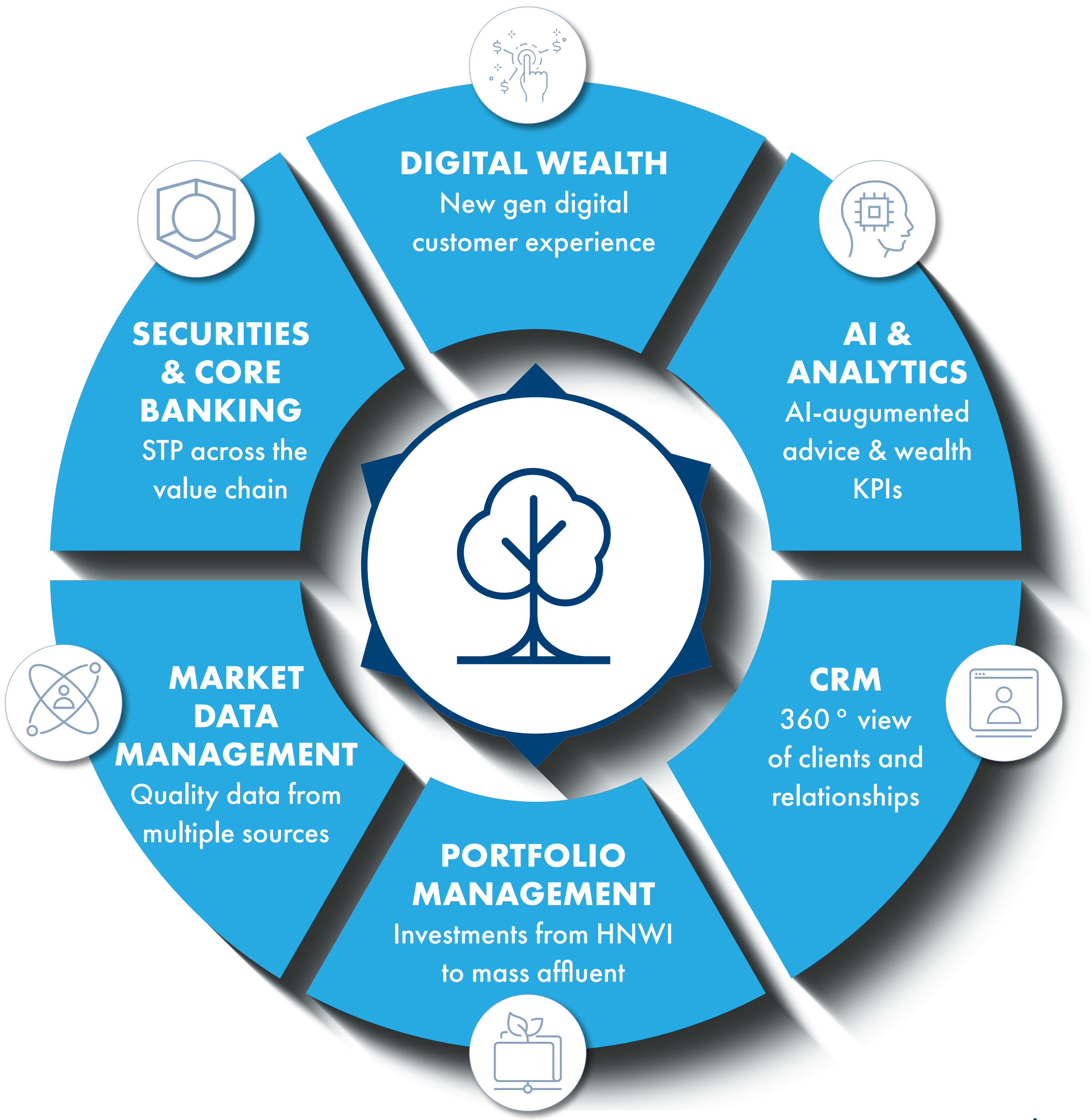
What Our Solution Covers?

Fortune Wealth is an end-to-end solution made of best-of-breed standalone components that cater to all the needs of wealth management firms and individual investors. It covers wealth management, customer relationship management, portfolio management, back office processing, market data management, analytics and AI.



Features

Pipeline Management

A solution that helps you keep track of potential investors and opportunities across every point of contact.

Research Management

Software that streamlines your firm's research, featuring easy integration into investment and trading tools.

Trade Order Management

A trade order solution that drives efficiency and transparency while streamlining daily trading workflows across any asset class..

Compliance

A set of digital tools to help you integrate exposure and market data to meet compliance standards at all stages of trading.

Investor & Investment Management

A CRM solution that integrates seamlessly with accounting and investor portal solutions.

Benefits

Customer loyalty
Enhanced customer satisfaction with personalized service enhanced by technology.

Automation

Automated trading can help you increase the efficiency of your trades – by enablingfaster execution of your CFD trading strategies.Reduce the impact of emotional and gut reactions with planned strategies.

Cloud Trade Intelligent Ordering
CloudTrade automates multiple processes and checks for each order and yet each one takes less than a minute to process and feed in to our interface.
CloudTrade has made a big difference to our business processing quick and accurate.

Multi Asset Class Expertise
The Fortune Wealth Group has the expertise and knowledge honed from operating across several markets, across different market cycles and conditions, across different asset classes.
We offer research, investment ideas, themes and actionable strategies.

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At Fortune Wealth we know that creating wealth is not easy. It is a long & hard journey.Hence it is even more important that the wealth that has been created is well sustained for yourself, your family, and your business.With over one decades in the sector of financial services, we have experienced diverse clientele and situations.This has enabled us to offer you the right aids to better manage your money through adequate financial planning,profitable investments and ideal asset management techniques.
Our knowledge of the market of over one decade,with its ups and downs and our quick response to them has made what we are today – a reliable partner & a guide,providing you wholesome solutions for sound financial growth.

More information

Get in touch

To find out more about Fortune Wealth , ________

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About Fortune Wealth

Fortune Wealth is one of the fastest growing wealth management firm in india.Our clientele include - New Age Entrepreneurs, Business Owners/ Promoters, Family Offices, CXOs and Corporate Treasuries.
Our core philosophy of 'Ideas create, values protect' is translated into an approach that is led by entrepreneurship, research and creativity, protected by intellectual rigour, and analysis.

OUR PURPOSE
Help our clients capture opportunities and trends in financial markets protect them from risks in a volatile world.

OUR VISION.
To stay focused on the needs of our investors and be a benchmark in the investment field, by adhering to traditional values of simplicity, transparency and integrity while continuing to deliver steady performance over the long term.

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