

# Your client's offshore investment portfolio report is a few clicks away

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Gone are the days when compiling a report for your client on the performance of their offshore portfolio meant time-consuming manual administration and collating information from multiple sources.

The Glacier International Plan Portfolio tool allows an intermediary to provide comprehensive reports on their clients' portfolios with just a few clicks.

## Nine great benefits that the Glacier International Plan Portfolio tool has to offer:

1. Examine your client's portfolio performance for the period you wish to review.
2. The tool is a trusted source of market data with real-time look-through of portfolios. You're able to view the entire evolution of the portfolio, including contributions, withdrawals and market movements over the selected time period – elegantly presented in graph format.
3. The report displays the asset allocation, including category, country, asset class, sector and currency breakdowns.
4. The tool allows you to understand the risk characteristics of the portfolio, with a snapshot of ratio analyses presented across the period you select.
5. No manual extrapolation of data – you can check useful performance indicators, trends, and benchmark comparisons within a few clicks.
6. A reduction in time spent in collating data and the manual effort in compiling reports for your clients.
7. Improved efficiency that helps you make better decisions for your clients.

8. A comprehensive report that will become a key tool to help you decide on the appropriate actions to take in your client's portfolio such as switching or rebalancing.
9. The Plan Portfolio report that you compile for your client is beautifully illustrated in tables, graphs and pie charts, for you to present to them at your next meeting.

The Glacier International Plan Portfolio Report tool is available on the Glacier International investment platform. While it is in Phase 1 of rollout, watch out for some brand-new features coming soon in Phase 2. Some of the new features will include benchmarks available for selection to compare portfolio performance, multi-currency translation and more.

To know more about the Glacier International Plan Portfolio tool, reach out to your Glacier International business development manager.

The Glacier International Plan Portfolio tool cannot be used for share portfolios.

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