

Webank chooses Fida to offer its customers a navigation tool for investments selection and diversification.

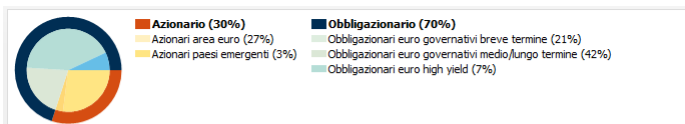
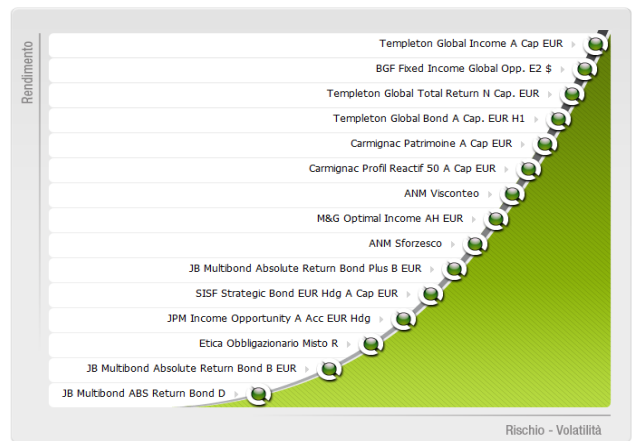
Requirements

Webank decided to create and offer to its customers a set of exclusive tools to fit in the investments area of its website. The target was to offer the best dynamic asset allocations and to allow users to pick the best mutual funds respectfully of their own characteristics in terms of risk tolerance and required performance. They looked for a partner able to represent both competence and professionalism in fund picking, quantitative portfolio management and in software development, with capabilities to design the new website section with top class standards in terms of programming language and appearance, always taking in consideration the firm's security standard.

Solution

FIDA delivered a toolset based on two different and high level instruments. The **Top Selection** guided tour, that is able to satisfy customers willing to invest even in just one mutual fund with attention to active portfolio management and diversification typical of the mutual fund portfolios.

Top Selection is a periodic fund picking based on a best return/risk ratio.



Composizione portafoglio

| Macro Asset Class | Peso | Asset Class | Peso | Importo da investire | Fondo |
|-------------------|------|-----------------------------------------------------|------|----------------------|-----------------|
| Azionario | 30% | Azionari area euro | 27% | 0 | SELEZIONA FONDO |
| | | Azionari paesi emergenti | 3% | 0 | SELEZIONA FONDO |
| | | Obbligazionari euro governativi breve termine | 21% | 0 | SELEZIONA FONDO |
| Obbligazionario | 70% | Obbligazionari euro governativi medio/lungo termine | 42% | 0 | SELEZIONA FONDO |
| | | Obbligazionari euro high yield | 7% | 0 | SELEZIONA FONDO |
| | | | | | |

Model Portfolio solution, on the other hand drives investor in building and self maintaining a variously assembled portfolio. Investor can choose among 5 different risk / return profiles available from the platform.

Advantages

Webank, thanks to FIDA and its work, is the first Italian bank that delivers exclusive and professional tools to its customer investors. The tool is easy-to-use and intuitive even if the built-in competence level is extremely high.

“I have been working with FIDA for a long time, and I consider it a reliable, flexible and innovative partner. I do especially appreciate their ability to adapt to our needs”

Stefano Cioffi
Head Of Product Management **Webank**