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### INVESTMENT TRENDS RANKS TOP PLATFORMS

By [Caroline Munro](#) on 6 May 2011 [0 comments](#)

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Platform providers have closed the gap in their service offerings through innovative approaches to model portfolios and client portfolio management tools, according to the 2010 [Investment Trends Platform Report](#).



The report covered 26 leading master trust and wrap platforms, ranking [MLC Navigator](#) highest in terms of overall functionality, followed by FirstWrap, [netwealth](#), [Asgard eWrap](#) and [Macquarie Wrap](#). MLC Wrap and Navigator also ranked first for transactions and integration, while netwealth was ranked first in terms of decision-making and reporting. Asgard's AdviserNET was awarded best navigation and user interface.

Investment Trends stated that the review revealed that investment platforms were increasingly addressing planners' need for greater efficiency. Innovations introduced over 2010 included features that allow planners to better manage client portfolios, transition more easily to a fee-for-service business model, communicate more easily with providers and navigate more intuitively, the report stated.

"The arms race between platforms intensified in 2010, with a range of providers developing significant new functionality," said Investment Trends analyst Recep Peker. "We are likely to see rapid development continue as platforms move to address new planner needs arising from the [Future of Financial Advice] reforms."

Significant changes across the platform industry included the establishment of sophisticated model portfolios, incorporating a broad range of investment types, including separately managed accounts and term deposits, reporting of clients whose portfolios move outside preset tolerance limits, and giving advisers more control over approved investment lists.

"Over the past few years, our industry research has identified portfolio management tools as a key gap in platforms' service offering," said Peker. "But in 2010 providers moved to close that gap."

He said platforms improving on efficiency was important in light of the FOFA reforms as about half the planners surveyed intended to look for platform cost savings in the future.

Two new platforms were included in the 2010 survey – HUB24 and [OneVue](#). Investment Trends stated that both platforms enabled advisers to administer a wider range of investments than traditional platforms, including direct and alternative investments.

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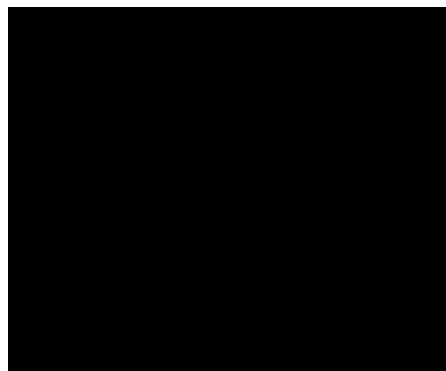
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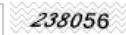
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