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Asgard upgrades eWrap

Monday, 6 June 2011 12:15pm
 By | In [Technology](#)



Asgard has released an extensive range of new features for its eWRAP platform designed to drive greater productivity and profitability by helping advisers to deliver more customised advice for more clients in less time.

The enhancements include simplified share and managed funds trading, significant enhancements to template (model portfolio) functionality and online corporate actions for eWRAP super and pension accounts.

Head of Asgard, Craig Lawrenson, said they worked closely with advisers to ensure the changes would result in a simpler, more intuitive and user-friendly trading experience for advisers.

"We continue to invest in the eWRAP platform so that it streamlines portfolio administration and continues to deliver the features and functionality that advisers need to reduce the cost of providing advice.

 by, another timely return, Fairview Equity Partners Emerging Companies Fund AI

"We have over \$6.2 billion of funds under administration currently using templates, and these new enhancements to our templating functionality will mean advisers can now create templates comprising cash, managed funds and equities which they can link to multiple clients.

"In addition they'll now have the added ability to set portfolio preferences at an individual client level to tailor the template to the individual needs of the client.

"They'll benefit from greater portfolio administration efficiency, be able to keep clients' portfolios on track with our automatically-generated rebalance instructions and it'll be easier to customise templated portfolios to ensure they reflect the needs of different clients. The new features mean clients can be advised individually but, where appropriate, execution can occur collectively."

Lawrenson said enhancements to share trading within eWRAP were particularly timely as the inclusion of equities in portfolios continued to see a resurgence.

Simplified share and managed funds trading, and online corporate actions have also been introduced for Asgard's Managed Profiles platform. Both eWRAP and Managed Profiles are accessed through Asgard's award-winning AdviserNET which recently won the 'Best Navigation and User Interface' award in the 2010 Investment Trends Platform Report.



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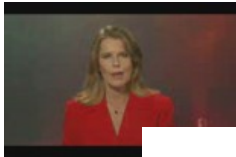
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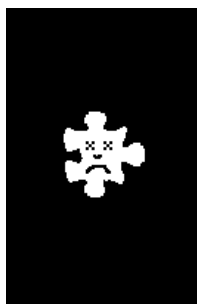
Australians regain love of shares In 2010 43 per cent of Australians owned shares, reversing a long downward trend, according to the latest survey from the ASX.

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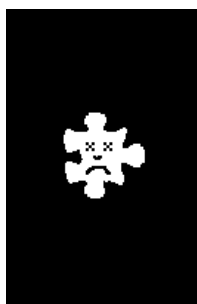
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