GSPHERE.NET FOR PORTFOLIO MANAGERS

Gsphere.Net Portfolio Manager is a powerful online technology service for creating and analyzing portfolios. Gsphere.net is a hosted solution with automatic security, redundancy and backup managed by Amazon.com on the Elastic cloud (EC2.)

Gsphere Portfolio Managers user have portfolio construction tools second to none, You can create a rules engine that when applied to any portfolio governs how that portfolio gets built, backtested and automated. Gsphere analytics, visualizations, measurements, side-by-side comparisons, factsheets and proposal facilitate client education and engagement. Gsphere automation, optimization, history tracking and diversification analytics help fiduciaries meet regulatory and professional requirements.

Optimization Policies

- Shrinkage (James / Stein Estimation)
- Custom Shrinkage Targets
- Correlation Calculation Options
- Multi-Sampling
- Sample Weighting
- Elective Calculation Dimension
- Risk and Return Forecast Importing
- Risk and Return manual forecasting
- Risk and return estimation logging
- Position Constraints
- Global Constraints
- Risk & Return Estimation Floors & Ceilings
- Custom Hurdle Rate
- Easy Saving & Retrieval of Policy Trees
- Stop Loss
- Risk Definitions
- Threshold Constraints
- Monte Carlo Simulation

System Overview

- Diversification Optimization
- Diversification Visualization
- Diversification Measurement
- Client Portal
- Risk Profiling
- Portfolio Customization per Profile
- Investor Contact
- Unlimited Clients
- Unlimited Portfolios
- Max Portfolio Size = 200
- Portfolio Entry by Allocation, Shares, Value
- Global Exchange Listed Products
- Symbol Lookup
- Custom Folders
- Investor and Colleague Sharing
- Website Embedding
- Investor Access
- Collaboration / sharing
- Linking to any strategy (from within any designated page)
- Multi-period walk forward back testing
- Excel Importing
- Combo Return Forecasting
- Models of Models
- Core Satellite Optimization
- Group Constraints
- Fee Settings
- Web Service
- Recommendation Engine

Reporting & Analytics

- Custom Branding
- 3D pdf Generation
- Comparison Reports
- Excel Export
- Profit & Loss Report
- Correlation Matrix Report
- Custom 3D Strategy Factsheets
- Interactive Gsphere Graphics
- Risk & Return Chart
- Positions Chart
- Recommendation Report
- Return Table (Calendar or Trailing)
- Risk Table
- Diversification Report
- Diversification Source Chart
- Allocation Chart
- Drift Report
- Performance Vs Benchmark
- Benchmark Statistics
- Advanced Quantitative Data
- Asset Performance Spark charts
- Systemic Risk Measurement
- Custom Blended Benchmarks
- Risk & Return Bubble Chart
- Upside & Downside Capture
- Alpha, Beta, R2 & Yields
- Performance Ratios
- Dynamic Multi-Period Portfolio Assembly

Technology

Access to Research Page for logging and monitoring positions, creating watch lists and candidate sets, which are recyclable building blocks to streamline custom portfolio management.

World leading portfolio level backtesting featuring all combinations of policy trees additionally including fully automatic walk-forward out-of-sample multi-period backtesting including your custom designated combinations of re-optimization and rebalancing for the most accurate and unbiased look back for any strategy or custom portfolio solution.

Data

Standard market data coverage, including worldwide exchange listed product, Indexes and US mutual funds. Other data sets available for additional fee.

Updates & Future Development

Enhancements and updates to the Portfolio Manager version are included at no extra charge. Gsphere is often updated multiple times per month.

Support & Training

Front-end training, system overview, reports, analytics, proposals, policy tree usage up to one half day total. Gsphere.net is a fully hosted, turnkey, cloud solution. Help files and video training are available. Unlimited email support is included.

Consulting

Advanced training, portfolio strategy, advanced research and best practices consulting available.

Marketing

Online access to our digital marketing library. Collaboration opportunities.

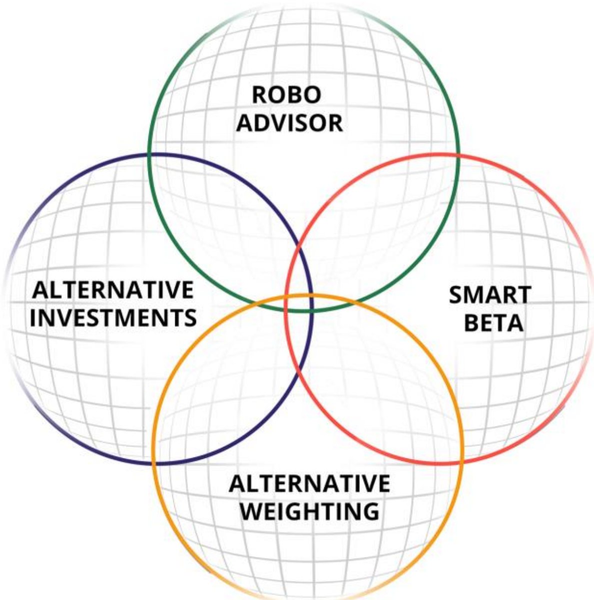
Robo Advisory

Gsphere Portfolio Manager is used in support of model-based RoboAdvisory clients. For clients using the technology as a stand-alone, without the automations, embedding, account sign up, investor portals and trading integrations, portfolio manager offers a way to serve clients' portfolio needs with a clear upgrade path to a complete automation solution whenever you are ready.

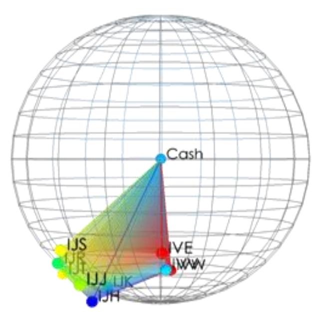
About Gravity

Approximately $30 Billion has been professionally managed by our patented software as a service by our Financial Advisor and Institutional Wealth Manager clientele using Gsphere Diversification Optimization™ portfolio technologies. Our research based Journal of Index, Legends of Indexing issue research results generated over 400 basis points annually to the cap weighted S&P 500 and Diversification Weighted® strategies can now be readily customized for varying, objectives, investments, asset classes, strategies, brand sponsors and platforms using Gsphere Institutional RoboAdvisor technology.

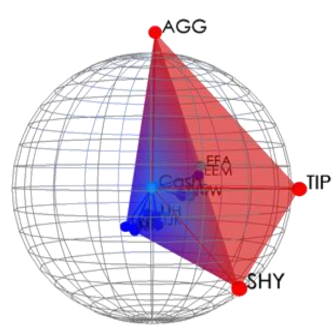
Gravity's deep, proprietary, quantitative science is at the confluence of Alternative Investments, Alternative Weighting, Smart Beta, and Robo – Advisory. Gsphere technology is consistently regarded as novel, impressive and efficacious by sophisticated financial professionals.



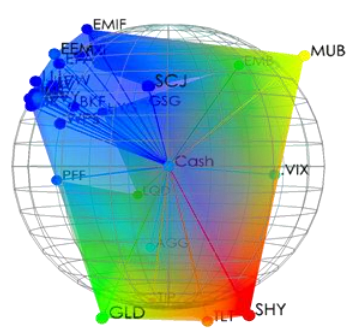
Diversification Weighted® Strategies are systematic, quantitative and replicable. Unlike other weighting approaches, we offer an inherent ability to work across all security instruments, asset classes and investment strategies. Our patents and technologies for diversification measurement, visualization, search and optimization are seminal and profound.
Our holistic 3D portfolio visualizations (below) expose diversification deficiencies and drive demand for a balanced solution.



Style Box Strategy



Typical Stock and Bond Model



Diversified Strategy