

# Top Data for Profidata

## The Swiss IT group Upgrades its e-AMIS Banking Software

Banking Software requirements have become increasingly demanding over the past years. Profidata Group was one of the first companies to identify the trend. Now, in addition to their traditional middle and back office functionalities, Profidata has added new features related to analysis, advisory and decisionmaking particularly in the field of Wealth Management.

With their eyes on this, Profidata, the Swiss asset and wealth management software firm, has invested heavily in the expansion of its internationally successful e-AMIS software for client advisors and portfolio managers. The software is easy to use and highly economical for its clients, supporting the whole investment 'straight through process' (STP). This includes analysis, portfolio modeling, securities accounting performance tracking, risk management, compliance and extensive

reporting options. And, as a new feature, they have added the analysis and risk assessments of the research expert, theScreener.

«Integrating theScreener's content has once again broadened the e-AMIS set of functions, and provides important added value to our clients,» says Stefan Zimmermann, executive vice president and head of e-AMIS at Profidata. «Based on theScreener's independent evaluations, the client advisor can immediately spot weak equity positions in any portfolio and boost responsiveness. The availability of an easy to read equity research report as a hand-out, takes efficiency to the next level.»

The screenshot displays the e-AMIS software interface. At the top, it shows the user '100200 Muster Andrea - e-AMIS Vermögensanalyse' and navigation options like 'Anwendung Bearbeiten Ansicht Reporting Extras Administrator Hilfe'. The main area is divided into several sections:

- Left Panel:** A table titled 'Gesamtportfolio' showing industry sectors and their percentages.
 

Branche Gruppe / Land Gruppe (%)	CH	EU	US	PA	Total %
Gesundheit	20.50	3.02	5.03	0.00	28.55
Finanz	16.28	3.41	0.00	0.00	19.69
Informationstechnologie	7.03	5.29	6.19	3.40	21.90
Übrige	6.54	0.00	0.00	0.00	6.54
Industrie	3.60	3.17	0.00	0.00	6.77
Lebens- + Genussmittel	2.53	0.00	4.74	0.00	7.28
Energie	0.00	4.60	0.00	0.00	4.60
Konsumgüter	0.00	2.21	1.65	0.00	3.86
Versorgung	0.00	0.00	0.82	0.00	0.82
Total in %	56.49	21.69	18.43	3.40	100.00
- Center:** A 3D pie chart showing asset allocation: Inform 24.378%, Finanz 15.714%, Gesund 13.917%, Indus 14.609%, Energ 21.196%, and Konsum 10.194%.
- Right Panel:** A 'Checklist' with various criteria and status indicators (green/red) for 'Aktien'.
  - Em - Trend: Positiv
  - Veränd.-Trend: Positiv
  - Bewert.-Status: Positiv
  - MF Tech Trend: Positiv
  - 4000 Pakt: 0.8%
  - Risk Zone: Positiv
  - Allgemeiner Eindruck: Positiv
  - Positive Analyseerwartung seit 02-Apr-2008
  - Stark unterbewertet
  - Neutraler Marktrend nach vorläufig (seit dem 02-Jul-2008 anhaltender) negativer Phase
  - vs. DJ Stove 600
  - Verbesserung von mittel auf tief am 09-Apr-2008
  - Verschlechterung von positiv auf eher positiv am 02-Jul-2008
- Bottom Panel:** A table of 33 detailed positions. The first few rows are:
 

Anzahl/Nominal eff.	Titel-/Kontobezeichnung	Währ	ISIN/Konto	Werten-Nr.	Storno	Report	Risiko	Gesamteindruck	Preisrating
1'300	Pfizer	USD	US7170811035	962004	★★★★	HL	●●●●	●●●●	●●●●
500	Procter & Gamble	USD	US7427181091	963896	★★★★	HL	●●●●	●●●●	●●●●
200	Wal - Mart Stores	USD	US5931421039	994101	★★★★	HL	●●●●	●●●●	●●●●
10	Hesland - Namen-	CHF	CH0007186981	719698	★★★★	HL	●●●●	●●●●	●●●●
120	Syngenta - Namen-	CHF	CH0011037469	1103746	★★★★	HL	●●●●	●●●●	●●●●
- Bottom Right:** A detailed report for SYNGENTA AG, including a line chart of stock price performance and a table of financial data.