Macquarie's digital portfolio manager

Scale your investment process and manage risk with our end-to-end digital portfolio management engine

Macquarie's digital portfolio manager automates investment recommendations and advice documentation, streamlines digital authorisation and sends approved trades to be executed on Macquarie Wrap. It's configured to your investment philosophy and offers your firm the chance to re-think and scale your portfolio management process.

Automate investment advice

Generate investment advice in under 60 seconds. Supports more than 65,000 investment options including direct equities, SMAs, managed funds, ETFs, direct bonds and direct property as well as off-platform holdings.

Align to your firm's investment philosophy

Customise the investment engine to align to your firm's investment philosophy, and help advisers apply your philosophy consistently each time.

Automatically generate investment advice documents

Generate scaled SOAs and ROAs in a digital format you can edit. Incorporates adviser, administration and investment management fees and hyperlinks to all relevant PDSs.

Streamline digital authorisations

Leverage our stand-alone digital authorisation capability, or integrate with your existing process. Clients can authorise digitally or in person.

Execute on Macquarie Wrap

For investments available on the Macquarie platform, approved trades can be sent to the platform to be executed.

Manage portfolio health and reduce risk

Deliver investment advice using a controlled auditable process. Generate health scores for each client portfolio to manage risk and assess when it's time to rebalance.

How it works

Configured for your firm	Advice		Compliance checks	Advice document generation	Authorisation	Trades sent to Wrap
Client • Fact find • Risk group • Advice scope	Reference portfolio					
	+					
Wrap • Client data • Model portfolios • Fees	Client portfolio	Investment selection and trade logic	Analysis (Pre vs Post)	Advice document	Digital authorisation	Execution on Wrap
	+	+	↓	+		
Licensee • Risk profiles • Asset allocation • Approved product list • Brand	Market, fund and quantitative data	Fees, CGT etc	Failsafe	Analytics		

Key benefits

- Scale your investment process
- Free up your team's time to focus on building relationships and helping clients achieve their goals
- Apply your investment philosophy consistently
- Generate bespoke investment advice or align your firm's models
- Provide rebalancing advice directly on existing portfolios
- Reduce risk by ensuring all your advisers are using best practice
- Enjoy the support of an enterprise partner.

What's next?

Speak to your business development manager, or visit **macquarie.com.au/dpm**