



Investments

the simplest way to track wealth

Investments by MX

Investments by MX represents a powerful yet simple way for users to keep track of their wealth. Users can see their individual financial holdings directly within MX products, making it easier than ever to see all their finances in one view.

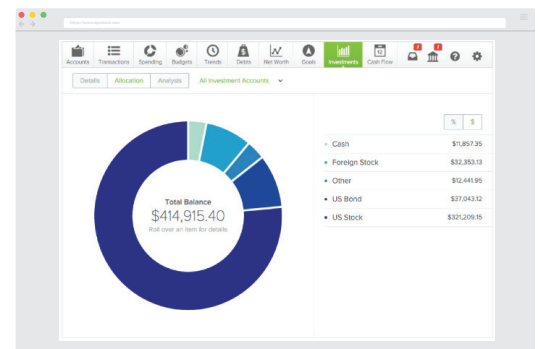
This feature also helps financial advisors better understand the structure of their client's current portfolio. Financial advisors can use Investments to offer the best advice possible — advice that can be conveyed only when an advisor can sit down with a client and view that client's full financial picture.

With Investments, users enjoy the reliability and stability that comes with automatic multi-source aggregation of accounts and holdings.

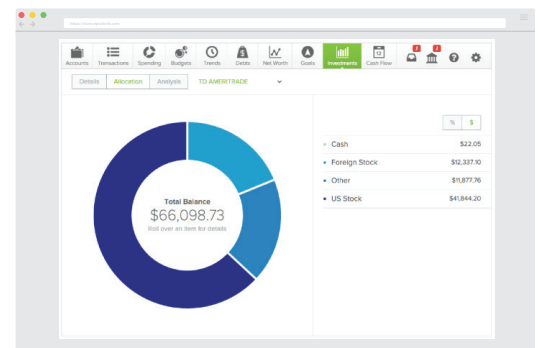
These users can view the entire portfolio, individual accounts, or even individual holdings (type and class).



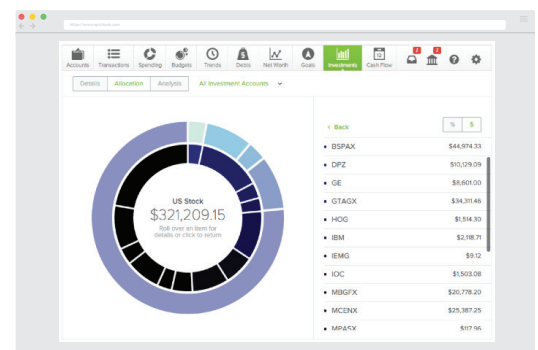
Full Portfolio Overview

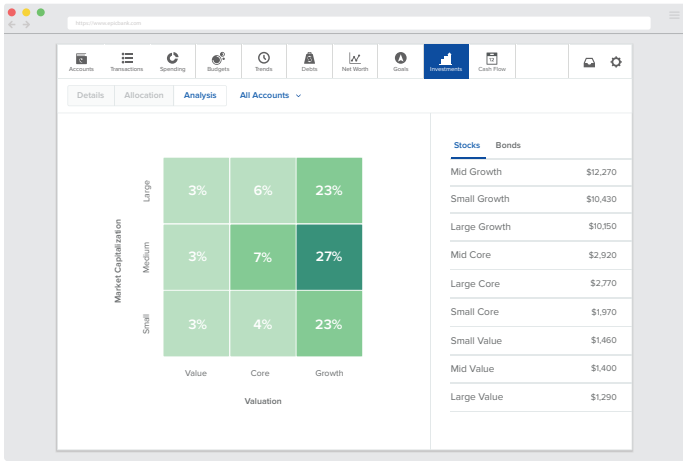


Individual Account Breakdown

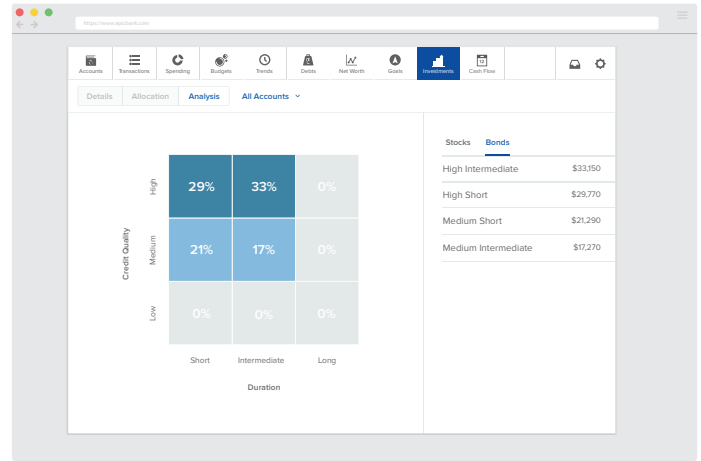


Individual Holdings Breakdown





Equity



Fixed Income

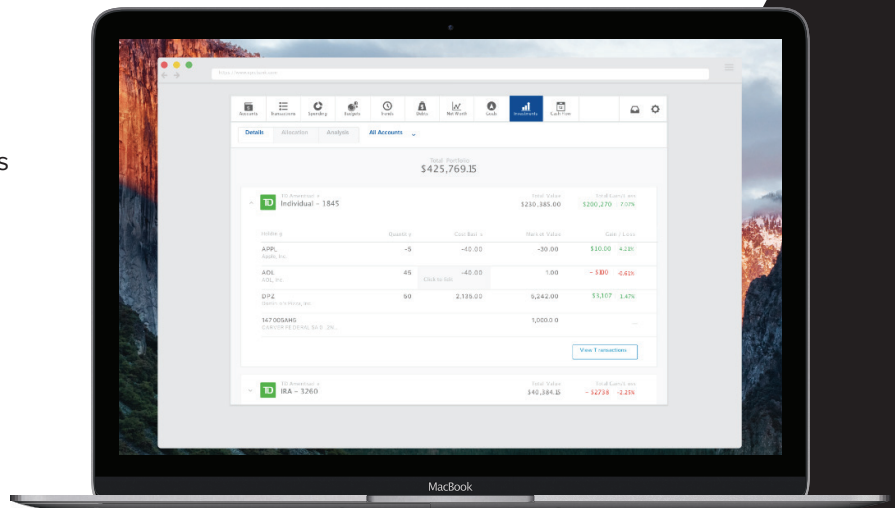
In addition, users can view equity and fixed income style boxes, giving them the insights they need to make smart market decisions.

Why Investments?

Investments by MX offers a terrific user experience, competitive pricing, and high quality data. Best of all, it directly appeals to your most profitable users — solidifying their relationship with you and bringing you an impressive ROI.

Key Differentiators

- Automatic aggregation of accounts and holdings, using the MX multi-source aggregation platform
- Account-level and portfolio-level breakdowns
- Multi-layer investment data cleansing and augmentation
- Industry-leading UI and UX
- Competitive pricing



Ready to learn more?
 Call **801-669-5500**
 or email **sales@mx.com**

