ETF Web Applications
For Advisors, Investors and Traders

Comprehensive Web Services for the ETF Investment Cycle
STRENGTHEN AND GROW YOUR BUSINESS WITH COMPREHENSIVE ETF SERVICES

Take advantage of the growing use of ETFs among advisors and retail investors to fortify and expand your business. With over 1,400 ETFs now available in the US, your clients are looking for comprehensive online data and tools to help them understand the ETF marketplace and make better investment decisions.

As a leading global provider of ETF valuations and web applications, Interactive Data is uniquely positioned to help you create or enhance these types of ETF services for your target markets.

Our newest suite of ETF web applications is designed to support advisors, and their clients – the retail investor – throughout their entire cycle of an ETF investment from research, analysis, idea sharing and validation to modelling, and ongoing monitoring.

Customized for your requirements

All applications can be customized to adhere to your firm’s brand guidelines and embed seamlessly into your web and mobile properties. They can be easily configured as a comprehensive ETF portal or as single modules. The applications can even be deployed to highlight your firm’s research and investment ideas.

INNOVATIVE TOOLS TO SUPPORT THE ETF INVESTMENT CYCLE

ETF SCREENER

Let’s say your target market is looking for the ten most liquid, least expensive ETFs in emerging markets. Or what if you want to exclude or include leveraged ETFs?

Our ETF screener helps you find any exchange-traded product (ETFs, ETNs, commodity trusts, etc.) across a wide range of important search criteria such as fund structure, asset class and sub-asset class, premiums and discounts, traded volume and many more.
ETF PERFORMANCE ANALYZER

What drives an ETF’s return? How much global opportunity does a sector ETF offer? How pure is a particular large cap ETF’s exposure? The ETF Analyzer shows investors how an ETF is constructed and the amount of exposure it provides in different sectors, countries and market capitalizations.

ETF PERFORMANCE COMPARISON

How different are all of the ETFs that track the S&P 500®? Which sector ETF provides the most exposure to global technology?

With Interactive Data’s Performance Comparison application, you can compare and contrast multiple ETFs to see where they differ and where they overlap.
ETF LIQUIDITY ANALYZER

How can your clients measure an ETF’s liquidity so they can set proper limit orders? How do they know if a particular spread on an ETF is fair?

The ETF Liquidity Analyzer leverages our calculation platforms and advanced charting features to provide insight for your clients into these questions.

ETF PROFILES

From reference data to real-time market data and analytics, our ETF profiles cover every type of exchange-traded product. These profiles can be configured as full web pages or as tooltips within an application to avoid interrupting your clients’ workflow.

CHARTING

Need to see how an ETF is trending over custom time periods?

Chart ETF prices, volumes, spreads, premiums and discounts and a host of other market data to help you see and explain an ETF’s characteristics.
CORRELATION CALCULATOR

Advisors rely extensively on return correlations when selecting ETFs to diversify an investment portfolio or enhance returns.

Our Correlation Calculator provides comprehensive correlation analysis across multiple time periods on US-listed stocks, ETFs and mutual funds to help advisors build better ETF and multi-asset class portfolios.

PORTFOLIO HYPOTHETICALS

Need to see how an investment portfolio of ETFs might fare under different economic conditions?

Our hypothetical tool helps investors model different allocations to optimize their portfolios’ risk and return characteristics.
Once an advisor has done the analysis and solidified an investment idea, how is this communicated?

Our leading-edge reporting and publishing platform allows your clients to create highly customized proposals and reports and share them via social media messaging and email.

The platform’s compliance functions give firms the ability to control disclosure language, select from a variety of report templates and track a report’s distribution.
SPREAD ALERTS

To help investors stay on top of market actions, our Alerts can be configured to track many types of ETF market events such as premium and discount levels, bid/ask spreads and more.

Alerts can be customized to include your own news or marketing messages to provide you with true “permission marketing” opportunities.

WATCH LISTS

How do investors know when it’s time to rebalance a portfolio or modify a position?

Within all of our applications, your clients can easily set up intraday monitors on numerous market data events and thresholds selected by the user including ETF and stock prices, premiums and discounts, volume and other important investment metrics.
ABOUT INTERACTIVE DATA

Interactive Data Corporation is a trusted leader in financial information. Thousands of financial institutions and active traders, as well as hundreds of software and service providers, subscribe to our fixed income evaluations, reference data, real-time market data, trading infrastructure services, fixed income analytics, desktop solutions and web-based solutions. Interactive Data’s offerings support clients around the world with mission-critical functions, including portfolio valuation, regulatory compliance, risk management, electronic trading and wealth management. Interactive Data has over 2,500 employees in offices worldwide.

For more information, please visit www.interactivedata.com.

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