

Press Release



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Collidr launches powerful new portfolio assistant technology for advisors: 'Noxai'

- **Free-to-use solution gives adviser firms state-of-the-art portfolio management software, enhanced AI tools and portfolio analytics.**
- **Built with Consumer Duty in mind, Collidr's Noxai gives firms the technology to manage their advisory investment propositions.**

Collidr Technologies Ltd, a technology firm which has provided portfolio solutions to advisory firms for almost 10 years, has launched its latest application, Collidr's Noxai. Billed as a 'free-to-use digital portfolio assistant', with premium and customised versions also available, Noxai's features include:

- **Portfolio healthcheck:** users can keep tabs on performance and risk across all their portfolios
- **Portfolio projections:** users can model future portfolio values and outcomes
- **White label reporting:** users can create their own customised dashboard of portfolio information, and produce client reports with their own branding
- **Content generation:** users can design and deliver automated market commentary and portfolio reports to their clients
- **Alerts:** users can get real-time 24/7 notifications for any portfolio issues

With the free version, up to 3 users can create 100 different portfolios, selecting from more than 100,000 funds and ETFs. In addition, depending on the final plan selected, the tool also offers customised user roles, bottom-up portfolio attribution, health check alerting, and portfolio and funds stress testing. This information can then be used to create market and portfolio performance commentaries, custom portfolio factsheets, and fully automated batch factsheet production.

Commenting on the launch, Collidr's CEO, Symon Stickney, says: "Right now, total on-platform funds under management in the UK is around £722 billion, but only £131 billion is in discretionary managed solutions.¹ The lion's share – around half a trillion pounds of client assets – is in advisory portfolios. These assets are simply not getting the full attention they deserve, because managing those portfolios in the current regulatory environment has become much harder. We decided to change that.

"We developed Noxai to offer intelligence-led technology that makes it easy and cost-effective for adviser firms to build, manage and track all their portfolios under one roof, as well as offering added-value interactive analytics and tailored client reports. And we made it free to use.

¹ Source: Platform, May 2024.

Symon Stickney added, “Noxai will be a game-changer for adviser firms, giving them the means to improve their in-house portfolio management capabilities, and deliver an enhanced client experience, at little or no cost, while giving firms back invaluable time and resources that can be better spent on growing their business.”

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About Collidr

Launched in 2015, Collidr Technologies Limited uses its proprietary AI technology to deliver investment portfolio solutions to the investment community on a stand-alone, B2B basis. In addition to offering technology, Collidr's Group also offers investment management and research services, on a B2B basis through an affiliated investment management firm, Collidr Asset Management Limited, which is authorised and regulated by the Financial Conduct Authority.

Collidr believes every investor would benefit from a disciplined, systematic approach to managing their investments, one that leverages intelligence-led technology every step of the way, as well as empowering investment professionals to make better investment decisions and digitalise the investment process.

Partnering with trusted advisers, Collidr's technology and services are available to: Financial Advisors, Wealth Managers, Actuarial Consultants, Private Banks, Life Companies, Pension Scheme Advisors / Providers, Asset Managers, Discretionary managers, Family Offices.

Collidr technology powers global client assets of c£8+ billion.

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