

Introducing Platinum, Fundscope's online Platform database



Platinum – staying ahead

The key to success in today's volatile and fiercely competitive market is to pinpoint opportunities as well as monitor competition and market trends. Access to reliable and accurate market intelligence is therefore critical to staying ahead.

Fundscape's paper-based Platform Report allows subscribers to monitor platform trends on a quarterly (and static) basis, providing unique insight into current developments. But using it to monitor longer-term trends is difficult without re-keying numbers into spreadsheets... until now, that is.

Housing all data collated since 2006, Fundscape is pleased to present the Platinum database. This new tool does away with the need to re-key data, and provides subscribers with a unique and dynamic web interface to historical platform data and trends.



FUNDSCAPE

Platinum – dynamic data

The Platinum database is versatile and easy to use, and can be accessed from anywhere in the world, day or night, 365 days a year. Save valuable time and resource, with market intelligence at your finger tips:

- 📊 Input quarterly submissions and view historical data
- 📊 Monitor competitor and product trends over any time period
- 📊 Spot new trends and identify longer-term patterns
- 📊 Run reports by platform, product, business segments or channels
- 📊 Analyse and monitor trends in assets, asset growth, gross sales and net sales
- 📊 Export data in spreadsheet format.



Platinum – submit your numbers

Input and access your own numbers from one screen:

PLATFORM REPORT DATABASE

Welcome

REPORT GENERATOR

USER ADMIN

LOGOUT



Input or review your data for the quarter:

View	Questionnaire quarter	Questionnaire status	Request date	Deadline date
	Q4 13	To be completed		
	Q3 13	Complete		
	Q2 13	Complete		
	Q1 13	Complete		
	Q4 12	Complete		
	Q3 12	Complete		

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PLATFORM REPORT Q4 13

PRODUCT MIX

The totals in both tables - by product or by business segment (below) - should be the same

Add 'x' Click to add or remove estimate code 'x'

	Assets		Gross sales		Net sales	
		of which funds	New sales	Re-regs	New sales	Re-regs
ISAs						
Onshore bonds						
Offshore bonds						
Platform SIPPs						
Platform pensions						
Other pensions						
Unwrapped funds						
Unwrapped other						
Totals :						
	Split not known	Total assets	Split not known	Total sales	Split not known	Total sales

COMMENTS:

LAST MODIFIED 1 2 3 4

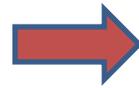
Assets by company	Gross sales by Company	Net sales by Company	Assets by business seg	Gross sales by business seg	Net sales by business seg					
Export										
Platform	Quarter	ISAs	Onshore bonds	Offshore bonds	Platforms SIPPs	Platform pensions	Other pensions	Unwrapped funds	Unwrapped other	Total
	Q1 06	5,414.9						2,059.8		7,474.8
	Q2 06	5,992.0						2,227.4		7,999.4
	Q3 06	6,161.0						2,662.0		8,324.0
	Q4 06	6,872.0						3,303.0		10,175.0
	Q1 07	7,399.0						3,641.0		11,030.0
	Q2 07	8,153.0						4,095.0		12,248.0
	Q3 07	8,391.0						4,411.0		12,802.0
	Q4 07	8,586.9						4,690.9		13,277.8
	Q1 08	7,999.5	350.0	14.0	648.0			2,516.2		12,313.9
	Q2 08	9,292.0	334.3	24.8	731.9			4,192.9		14,377.0
	Q3 08	8,347.1	376.8	30.3	716.5			3,852.6		13,323.1
	Q4 08	7,895.1	355.2	38.5	727.1			3,771.2		12,787.0
	Q1 09	10,942.0	334.0	38.0	735.0		3,145.0	5,297.0	2.0	20,491.0
	Q2 09	12,306.0	359.0	41.0	831.0		3,711.0	5,769.0	2.0	23,019.0
	Q3 09	14,480.7	405.6	44.3	921.7		4,531.9	6,973.6	1.9	27,389.6
	Q4 09	14,917.6	418.1	53.7	1,001.1		5,138.3	8,231.8	1.6	29,882.3
	Q1 10	15,941.2	441.0	56.3	1,088.4		5,792.0	7,920.0	2.4	31,246.2
	Q2 10	15,141.9	426.8	56.4	1,064.3		5,447.0	7,526.4	2.1	29,664.9
	Q3 10	16,457.3	450.9	61.5	1,139.1		6,189.0	8,293.4	2.0	32,591.1
	Q4 10	17,482.1	468.8	65.4	1,208.8		6,880.7	8,988.6	1.6	35,097.0
	Q1 11	17,349.8	466.1	69.5	1,231.4		7,593.0	9,454.5	1.1	36,155.5
	Q2 11	17,625.1	490.2	67.9	1,240.8		8,238.3	9,348.3	1.7	36,972.1
	Q3 11	15,431.8	412.4	65.6	1,146.1		7,619.9	8,228.9	1.8	32,868.3
	Q4 11	15,932.6	411.3	68.2	1,188.9		8,221.0	8,594.0	1.8	34,117.0
	Q1 12	16,957.5	418.4	76.3	1,276.2		9,214.1	9,517.1	1.7	37,461.1
	Q2 12	16,578.4	391.8	76.6	1,260.1		9,068.4	9,316.6	1.0	36,692.9
	Q3 12	17,324.3	393.3	78.6	1,322.8		9,426.7	9,805.8	1.1	38,332.6
	Q4 12	17,764.0	387.0	80.0	1,342.6		10,275.2	10,020.8	2.7	39,872.3
	Q1 13	19,217.5	396.4	83.7	1,493.2		11,325.3	10,907.2	4.6	43,387.9
	Q2 13	19,175.4	370.1	84.6	1,430.6		12,049.8	10,876.4	5.0	43,981.9
	Q3 13	19,740.0	367.0	86.0	1,428.0		13,002.0	11,242.0	5.0	45,975.0
	Q4 13									

Platinum –generate reports

Choose from a growing list of reports (currently 34) and generate data instantaneously:

Please select the report you wish to view by clicking on the title below

1	Assets under administration
2	Gross sales by product
3	Net sales by product
4	Total gross sales
5	Total net sales
6	Asset growth
7	Products - ISAs
8	Products - investment bonds
9	Products - platform sipp
10	Products - platform pensions
11	Products - Unwrapped
12	Business segmentation - assets
13	Business segmentation - gross sales
14	Business segmentation - net sales
15	Business segmentation - fund platforms
16	Business segmentation - wraps
17	Business segmentation - sipp-only
18	Business segmentation - DC/Corporate
19	Business segmentation - institutional
20	Business segmentation - XO
21	Top funds by gross sales
22	Top funds by net sales
23	Top fund group by gross sales



1 Please select which report you would like to see:

Gross sales by product CHANGE

2 Please select the quarter to start the report from:

Q1 13

3 Please select the quarter to end the report on:

Q3 13 CREATE REPORT

EXPORT REPORT e = contains estimated figures

Platform name	ISA gross sales	ISA gross re-reg	Bonds	Platform Sipp	Other pensions	Unwrapped sales	Unwrapped re-reg	Total gross Sales
1 Cofunds	£1,217.3	£511.5	£23.1	£379.7		£8,771.6	£4,327.0	£15,230.2
2 Fidelity	£1,250.8	£172.0	£6.5	£170.3	£2,996.4	£1,763.0	£157.6	£6,516.6
3 Hargreaves Lansdown	£1,776.0	£553.8	£12.8	£2,093.4		£1,492.4	£524.4	£6,452.8
4 Skandia	£693.1	£111.6	£307.9		£1,271.9	£1,131.5	£89.6	£3,605.6
5 Standard Life	£854.0		£256.0	£1,222.0		£1,194.0		£3,526.0
6 AJ Bell	£585.0			£1,170.0		£585.0		£2,340.0 ^e
7 Ascentric	£542.0	£40.7	£135.6	£613.5	£84.0	£447.2	£44.1	£1,907.0 ^e
8 Transact	£460.0			£580.0		£780.0		£1,820.0
9 Axa Elevate	£456.0		£63.5	£631.1		£541.3		£1,692.0
10 Nucleus	£290.4	£31.2	£86.9	£509.5		£304.5	£49.7	£1,272.2
11 James Hay	£30.6		£2.0	£910.9	£10.1	£23.4		£977.0
12 Small platform group	£1,131.5		£62.2	£1,492.6	£21.5	£964.5		£3,672.3
Totals	£9,286.8	£1,420.8	£956.4	£9,773.0	£4,383.8	£17,998.5	£5,192.2	£49,011.6



Platinum – future enhancements

The Platinum database will be regularly enhanced and developed to ensure that it always responds to users' needs:

- ▣ Inclusion of new data points on an annual basis (eg expansion of business segments, advised and non-advised splits and other data requested by platforms).
- ▣ Move to monthly data once all platforms are able to provide on this basis.
- ▣ Inclusion of at least four new reports per year.
- ▣ Fundscape will also hold regular meetings to understand how platforms use data and their data wish-lists.



Platinum – subscription

To subscribe to the Platinum database, platforms must also subscribe to the Platform report and sign and abide by a confidentiality agreement.

- Subscription for 2016 is £6,000 per year.
- Annual price increases will be capped at 5% for the life of founder members' subscriptions.
- Founder members can develop /design two reports per year free of charge.

