

# Gain a Holistic View of Risk with PFaroe™ Wealth

In the ever-evolving wealth and Defined Contribution pensions market, managing the relationship between investment strategy, market risk and customer outcomes is key. Trusted by some of the UK's largest asset managers, advisers and wealth managers, PFaroe Wealth delivers powerful portfolio analytics and risk management capabilities that enable you to develop robust, risk-focused portfolio design and monitoring exercises to support your investment proposition.

## THE OFFERING COMPRISES TWO CORE ELEMENTS:



### **Analytics**

An analytics user interface that supports the design, investment governance and risk monitoring of fund solutions targeted at retail and Defined Contribution pension investors



### **Forecaster**

A forecasting engine that can be integrated into your digital ecosystem – driving engagement and retention by demonstrating likely investor outcomes.

## GAIN EFFICIENCIES AND REDUCE OPERATIONAL RISK

Built with the end user's needs in mind, PFaroe Wealth automates time-consuming tasks and delivers a consolidated solution that helps you address key business requirements.



### **Analyze**

Compare portfolio risk and return across a wide range of different risk and outcome metrics



### **Design**

Develop optimized investment solutions aligned to customers' financial objectives and risk profiles



### **Forecast**

Access powerful economic scenario models to forecast potential investor outcomes, providing a forward-looking view on portfolio risk



### Monitor

Stress test the effectiveness of risk management strategies. Efficiently monitor, track and report on risk across your investment proposition



### Engage

Create insightful and engaging content to support discussions and interactions with key stakeholders and clients

## DELIVER VALUABLE INSIGHTS



Compare DC scheme defaults and lifestyle glidepaths



Monitor DC scheme outcomes across member cohorts



Complete Value-for-Money analysis



Build efficient frontier models



Stress test strategic asset allocation decisions



Analyze the impact of tactical asset allocation choices

## HOW CAN PFAROE WEALTH HELP YOUR BUSINESS?

	Advisors	Wealth Product Providers	DC Pension Scheme Managers
Monitor solution effectiveness	✓	✓	✓
More efficient client/member reporting	✓	✓	✓
Grow your risk reporting operations	✓	✓	✓
Improve risk management	✓	✓	✓
Create tailored reporting	✓	✓	✓
Eliminate obsolete systems	✓	✓	✓
Design suitable solutions	✓	✓	✓

Demonstrate best practice processes	✓	✓	✓
Create more insightful stakeholder communications	✓	✓	✓
Reduce errors/eliminate manual processes	✓	✓	✓
Reduce key person risk	✓	✓	✓
Bolster modelling credibility	✓	✓	✓
Demonstrate objectivity	✓	✓	✓

### CONTACT US

PFaroe DB provides a modern technology solution to Asset Owners, Asset Managers and Consultants. To learn more about Moody's Analytics award-winning PFaroe solutions, visit [pfaroe.moodyanalytics.com](https://pfaroe.moodyanalytics.com) and complete the contact us form.

# MOODY'S

## CONTACT US

### AMERICAS

+1.212.553.1653  
[clientservices@moodys.com](mailto:clientservices@moodys.com)

### EMEA

+44.20.7772.545  
[clientservices.emea@moodys.com](mailto:clientservices.emea@moodys.com)

### ASIA (Excluding Japan)

+852.3551.3077  
[clientservices.asia@moodys.com](mailto:clientservices.asia@moodys.com)

### JAPAN

+81.3.5408.410  
[clientservices.japan@moodys.com](mailto:clientservices.japan@moodys.com)