



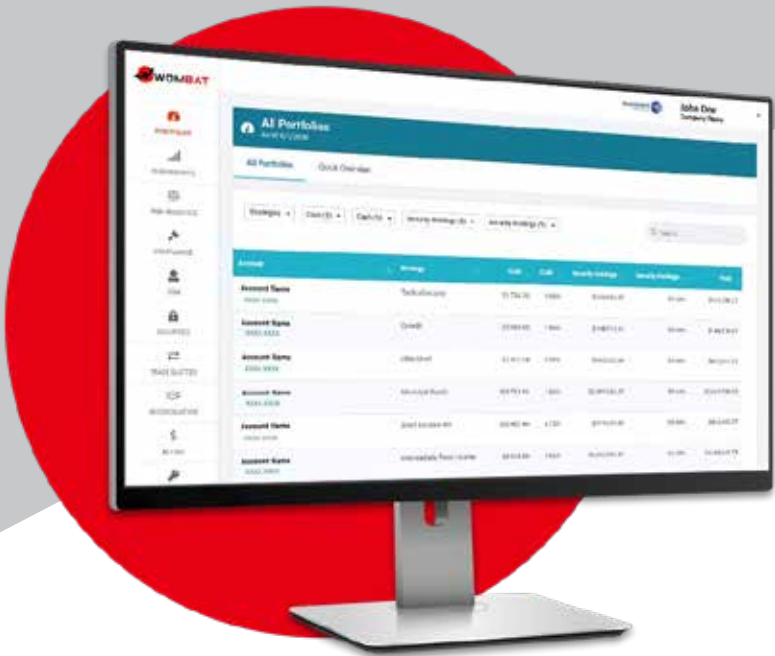
WINTHROP TECHNOLOGY SOLUTIONS

WOMBAT

AUTOMATING THE CLIENT REPORTING PROCESS



WINTHROP
TECHNOLOGY SOLUTIONS



ABOUT **WOMBAT**

WOMBAT is an investment software that reports detailed analytics for client portfolios. Its complex reporting capabilities provide clients with 24/7 access to their portfolio's performance, risk, and compliance information. The software was released in 2018 by Winthrop Technology Solutions, LLC, a privately owned company based in Indianapolis, IN. The company was formed by Gregory J. Hahn in March 2018.

WHAT WE DO

We provide technology solutions to investors and financial advisors, allowing them to access and analyze the details of their portfolios through our internet server.



WHY WE DO IT

WOMBAT was created to provide a sufficient, cost-effective alternative to expensive high-end investment software. WOMBAT provides complex analytic capabilities to financial advisors for a fraction of the price, and our partners can gain access to the software at no additional cost.



PERFORMANCE

- Analyze portfolio returns across varying time frames
- Compare performance data with several commonly used benchmarks
- Create charts & graphs for visual display of returns



RISK

- Analyze volatility across key risk indicators
- Compare multiple portfolios to identify risk and return trends
- Apply various filters and sorting options to detect anomalies among portfolios



COMPLIANCE

- Measure a portfolio's conformity to the client's investment guidelines stated in the Investment Policy Statement
- Customize the regulations and guidelines for each portfolio
- Clearly recognize when a portfolio violates compliance thresholds

WHY WOMBAT?

▶ QUICK REPORTING

WOMBAT generates portfolio reports at the click of a few buttons, and with the software's internet access, reports are available anytime.

▶ COMPLEX ANALYTICS

WOMBAT provides a variety of grouping and filtering functions that allow you to break down portfolio data and display explicit performance results across numerous indicators.





▶ COST EFFECTIVE

Alternative to high-end investment software, WOMBAT provides several of the same crucial analytics at a fraction of the cost.



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