

# Portfolio Risk Management Tool

## Case Study: ClearView solution for Scottish Life International

### The brief

Develop a web-based marketing tool providing portfolio risk modeling capabilities for IFAs.

### The solution

CG developed a comprehensive solution including a dynamic and interactive web front end linked to a server based web application.

The front end guides the user through a series of questions about their investment objectives, through portfolio selection and finally risk analysis.

It provides selection and graphing capabilities which can be modified in real time - allowing the user to play around with a variety of "what if" scenarios.

The calculations are performed by the DecisionsDecisions calculation engine, with communication between the front end and calculation engine being managed by the server web application.

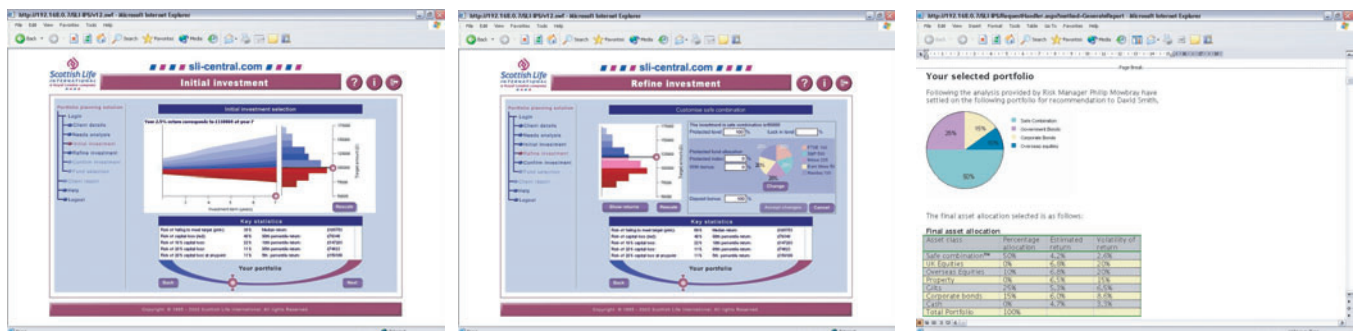
At the end of the session the user can download a customised report in Microsoft Word format with customised text and graphs. The user's data and preferences are stored on the database for use in subsequent visits.

### Technology

Flash 7 + ActionScript, ASP.Net, XML processing, RTF document generation with embedded graphs.

### Contact

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- > Our clients normally choose layouts, colour ways and designs in line with their corporate branding or marketing strategy
- > Through a consultation process we ascertain what information is most critical to helping their investors and the best way to communicate this data via our interactive software
- > We design the content screens. The resulting graphical projection and forecasting elements are generated by our proprietary calculation engine



[www.cgclearview.com](http://www.cgclearview.com)