

What's in Risk Explorer 2.0 Release?

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The Risk Explorer release 2.0 contains new features along with several improvements to the existing application.

New Features

Sustainable Drawdown

The Sustainable Drawdown calculator allows you to model different scenarios to see the projected longevity of the portfolio investment based on a target income and expected retirement term. The target income can also be compared to the anticipated annuity income.

Portfolio Factsheets

A Portfolio Factsheet for your Model or Bespoke portfolio from within the Portfolio Builder or Illustration Compliance Details screen. A Portfolio Factsheet will include fund details and statistics, performance, costs & charges, asset allocation, sector information and the Efficient Frontier graph.

Risk Profile Report

Once an Attitude to Risk questionnaire has been completed and set as the default for the Client, the Risk Profile Report can be generated detailing the client responses to the risk questionnaire, risk category, optional compliance notes and any historic risk profiles with associated chart.

Import Model Portfolios

A simple routine enables you to import all your model portfolios in one go. Download the sample file, populate with the portfolio names, range, fund codes and weightings then upload and import into your system.

Improvements

Significant changes have been made within the Illustration journey to improve on screen displays and navigation, allow additional modifications and make it easier to compare target and alternative scenarios.

[Risk Explorer 2.0 Release Notes.pdf](#) 
