



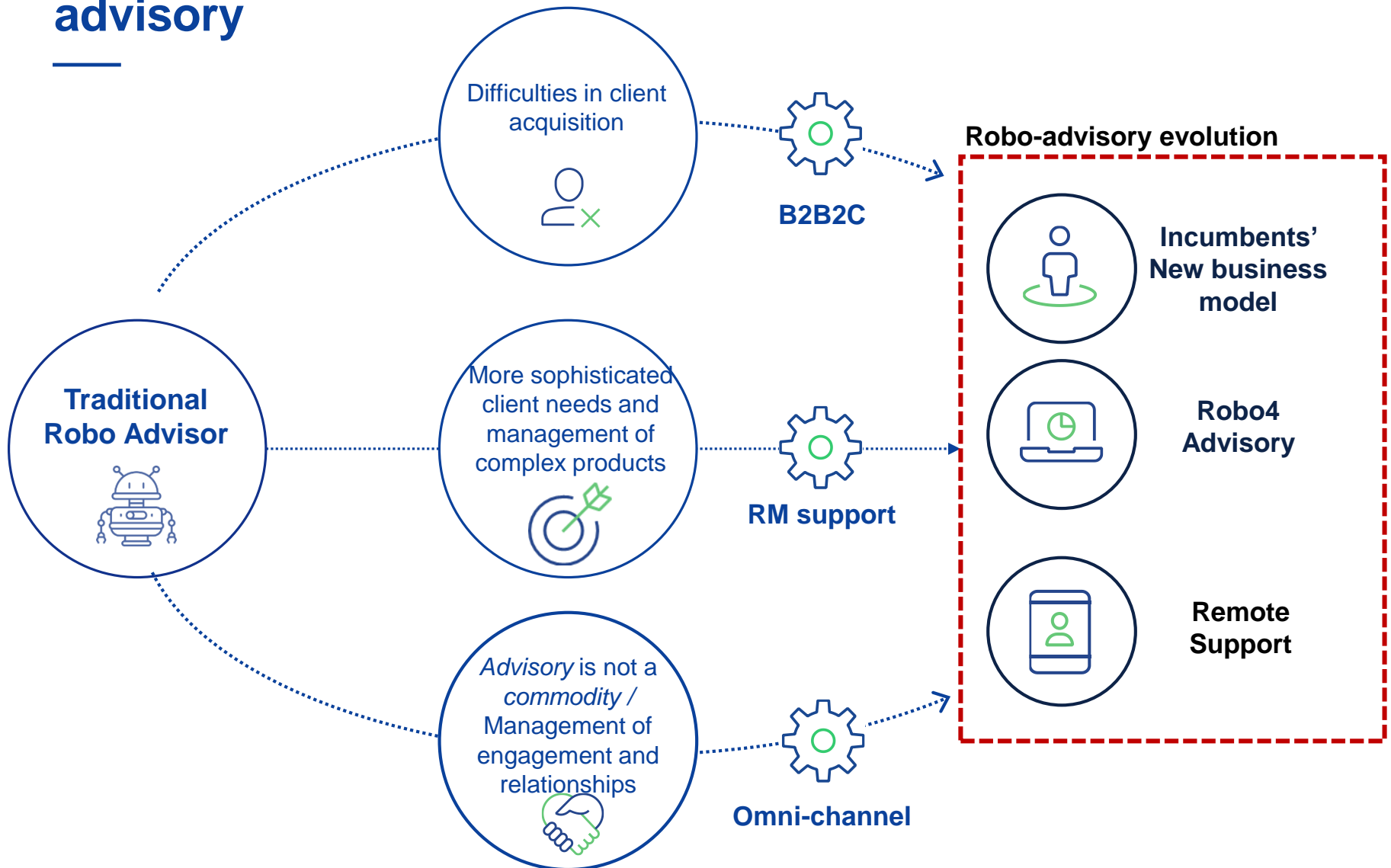
# Robo advisory: business models and investor protection

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BRUXELLES, 7th June 2018



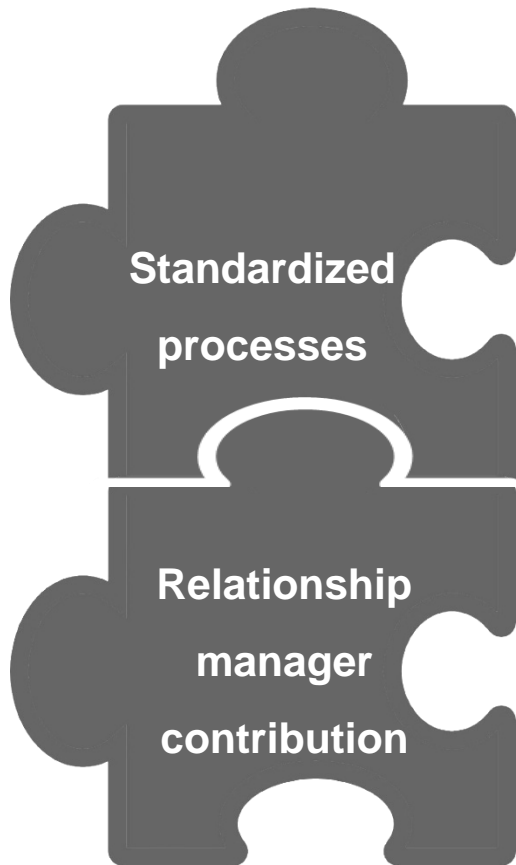
# Robo advisory evolution: convergence to hybrid advisory



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# Investor protection: traditional advisory VS robo advisory

Traditional



Robo advisory



Which safeguards should be adopted to compensate, at least in part, for the (partial or complete) absence of a relationship manager?

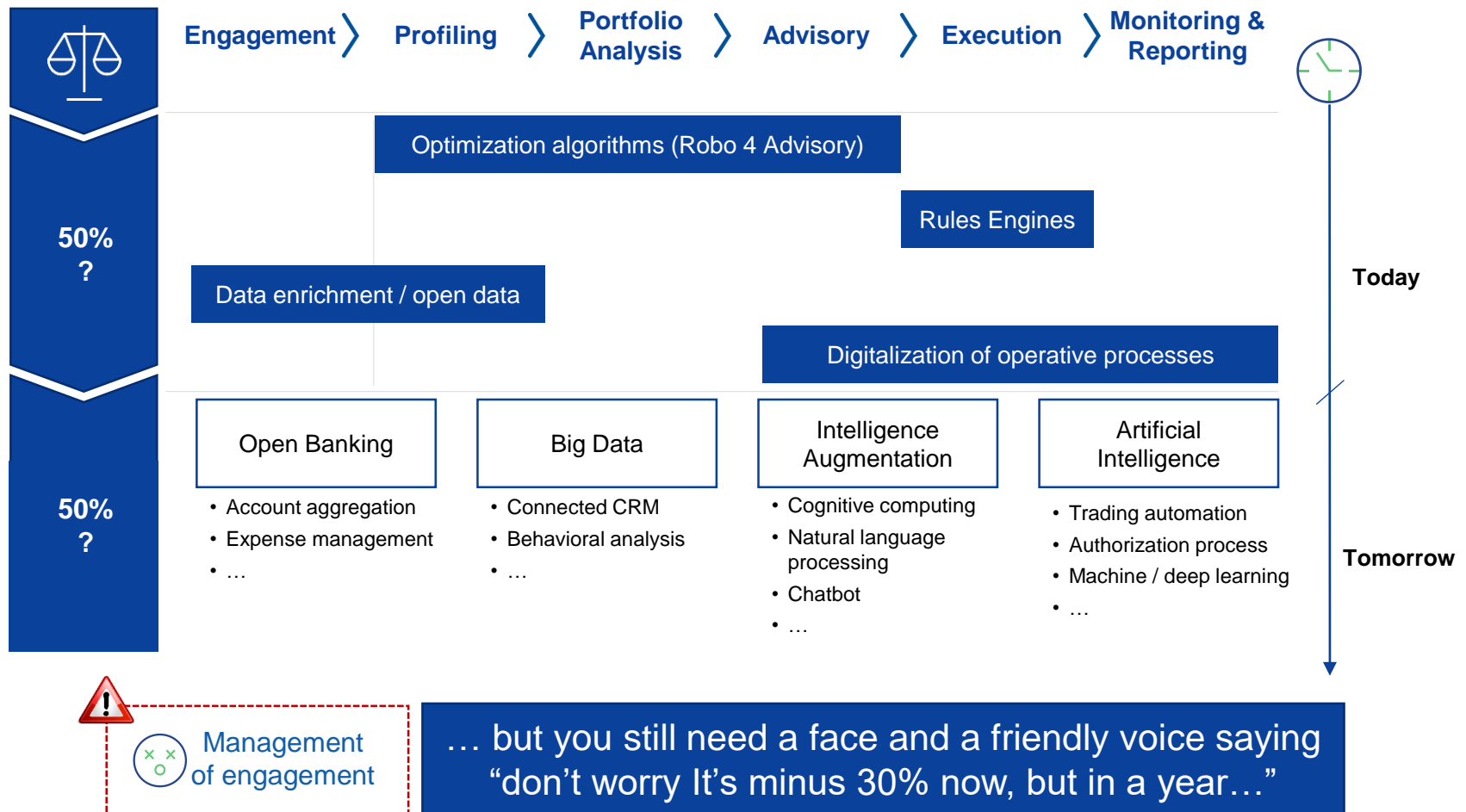
# Robo advisory: points of attention

It is necessary to apply **centralized safeguards** able to **govern and monitor** the entire process, an activity which must be performed centrally by **qualified personnel**

		Technological support
<b>profiling</b>	The collection of information should not be limited to the bare minimum, but extended to the specific needs and preferences of clients	Complete, proactive profiling able to increase the effective understanding of the client
<b>advisory</b>	Manage and utilize a significant amount of information provided by the client to prepare personalized investment proposals	<b>Sophisticated and robust algorithms</b> able to assist at every step of the client journey (e.g. storytelling)
<b>monitoring</b>	Provide a continuous monitoring system, which supplies the client with clear, timely and relevant information in an intuitive way	<b>Daily batch analysis</b> of client portfolio KPIs, able to also provide personalized rebalancing proposals

It's Robo but, first of all, it's Advisory!

# Technology is an accelerator for productivity and service quality...



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