

Sharesight and ProductRex join forces to make SoAs easier for advisers

Connecting Sharesight and ProductRex means financial advisers can aggregate data for thousands of stocks and ETFs, managed funds, super and pension funds.

SYDNEY, NSW, AUSTRALIA, November 29, 2021 /EINPresswire.com/ -- [ProductRex's](#) research tool for financial professionals has integrated with [Sharesight's](#) online investment portfolio tracker, creating a solution that makes it easier for financial advisers to generate Statements of Advice (SoA).

The fintechs have utilised Sharesight's API technology to grow ProductRex's data aggregation capabilities, which now include the 240,000 global stocks, ETFs and managed funds that Sharesight supports, alongside ProductRex's existing support for 400+ super, pension and investment platforms.

"Part of generating an SoA is to understand a client's assets and liabilities through multiple channels," says ProductRex founder Nick Topham.

"The integration partnership between ProductRex and Sharesight makes it easy for financial advisers to import share and investment data directly from Sharesight portfolios into their scenarios, removing the need for manual data entry."

By importing information directly from an investor's share portfolio on Sharesight, financial advisers can instantly leverage ProductRex's product recommendation engine, compare asset allocation and fees, and customise outputs to match a client's SoA based on Sharesight's record of assets held in an investor's portfolio.

"Automatic financial data aggregation like this allows financial advisers to save time on data entry, while ensuring the accuracy of client data," says Joe Salvati, Director of Partnerships at Sharesight.

"It leaves advisers with more time to focus on what actually matters, which is forming insights and providing quality advice to their clients – whether it's about rebalancing their share portfolio or switching to a superannuation fund that better suits their needs.

"This partnership is an example of how our API technology can be used to create powerful

solutions that propel forward the financial advice industry today, rather than wait for the scope of open banking rules to expand to include investment and trading platforms."

About ProductRex

ProductRex is a free product research solution for financial advisers, paraplanners, administrators and anyone working in financial planning. It offers advisers a way to compare products and fees to help in the creation of their Statements of Advice and allows direct integrations with third party providers. ProductRex is the core of an adviser's recommendation workflow, with the system being used before product recommendations have started, during the advice formulation process and directly before implementation of the advice.

About Sharesight

Sharesight is an award-winning fintech company with offices in Wellington, New Zealand and Sydney, Australia. Its secure, online portfolio tracker and performance reporting tool is used by over 300,000 DIY investors and finance professionals in more than 100 countries. Sharesight syncs with over 200 global brokers to track trades, dividends and corporate actions automatically, and allows clients to securely share portfolio access with others. For more information visit sharesight.com.

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