

Fifth annual WealthTech100 list reveals the tech companies transforming the investment and banking industries

The WealthTech100 list for 2023 highlights the leading solutions helping investment firms, banks and financial advisors in their digital transformation efforts.

LONDON, UNITED KINGDOM, April 4, 2023 /EINPresswire.com/ -- War, cost-of-living crisis and customer demand for best-practice digital experience have accelerated innovation in the investment sector. Many wealth management firms are now spending more on technology than most other areas of their businesses, making tech the most important aspect of managing and growing a wealth management firm.



WealthTech100 Logo



FinTech Global Logo

The new WealthTech100 list aims to highlight the tech innovation leaders in the industry and which business models will have a lasting impact. While the selection process is difficult every year, with the context of the market, deciding the 100 finalists proved even tougher.

The industry-leading list required a panel of analysts and experts to vote upon a list of over 1,200 businesses. Research on these companies was compiled by [FinTech Global](#). The finalists were selected based on their innovative use of technology to solve a significant industry problem, or to generate efficiency improvements across the investment value chain.

FinTech Global CEO Richard Sachar said, "At a time when not even the giants like Silicon Valley Bank and Credit Suisse are safe, it is vital banks and investment firms have the best technology behind them. On top of this, customers are demanding better and more streamlined engagements, and are more than happy to switch to a provider that offers this. This WealthTech100 list will equip senior-level leaders in financial institutions with detailed information on some of the most innovative companies in WealthTech."

Some of the world's leading companies in the 2023 WealthTech100 include:

Abbove (ex-PaxFamilia): wealth planning technology platform that helps financial institutions to place holistic wealth advice at the heart of the client relationship

additiv: facilitates business model change, helping brands and financial institutions capitalize on embedded finance by integrating wealth solutions into their offering through an orchestrated finance platform

CAIS: the first truly open marketplace for alternative investments, where financial advisors and asset managers can engage and transact directly on a massive scale

Croesus: a leading WealthTech offering highly secure solutions for portfolio management, portfolio rebalancing, risk and compliance management, and API integration

Embark: the UK's fastest growing digital retirement platform

ERI: international company offering the OLYMPIC Banking System® - an integrated, real-time, front to back technology platform

Etops: offers ecosystem for the financial industry which includes operational services, multi-bank reports, interactive dashboards, compliance solutions, PMS and CRM systems

FinaSoft: the digital full-service platform for secure and contemporary customer relations - supporting your communication, onboarding and advisory services

Fincite: software provider empowering financial institutions to provide digital investment services – from onboarding to reporting - to their clients

Finfox: a leading wealth advisory software offering an omnichannel hybrid investment advice solution for all touchpoints and devices

Flanks: Global wealth data orchestrating solution that automatically aggregates the position and operation of your clients into your reporting tool

GBST: delivering technology and digital solutions to enable, support and scale wealth management organisations globally

GrowthInvest: The Alternative Investment Platform. Making tax-efficient and private investments more accessible to wealth managers, financial advisers, and their high-value clients

Harvest: creates and designs digital solutions and software for all professionals in wealth management and finance

IntellectAI: offers a cloud-native, API-led microservices-based multi-product FinTech platform for global leaders in Banking and Capital Markets

InterGen Data: Leading Provider of Predictive Health and Wealth Life Event Data and Analysis

Jacobi: a uniquely customizable platform for multi-asset portfolio design, analytics and client engagement

La Meer: offers GRACE Integrated Client, Risk and Compliance Management Software for Financial Institutions

Lumenai Investments: a transformative AI investment service that enables investors and advisors to quickly and easily create hyper-custom, self-adapting, alpha-generating investment strategies

moneyinfo: UK-based FinTech specialising in client portals, mobile apps, onboarding, KYC and aggregation for the wealth management industry

NewBanker: a leading wealthtech in China offering one-stop digital solutions in marketing & sales for funds and wealth management firms.

NICE Actimize: the leading global provider of financial crime, risk, and compliance solutions

niiio finance group: a SaaS provider for asset and wealth management, digitalizing processes of more than 80 European customers

Ortec Finance: the company's OPAL solution facilitates goal-based planning and monitoring of clients' goals and guides the investment decision making process

PSplus: the leading partner for individual Wealth Management and Reporting Solutions whether for Family Offices, Asset Managers, Banks, or Foundations

PureFacts: Offers software and services to help the asset and wealth management sector better manage revenue, reduce risk, and achieve profitable growth

Quantfolio: market leading Nordic based FinTech company offering compliant-by-design investment advisory platform for leading banks and wealth managers

Refinitiv: provides the wealth management industry with world-leading content and intuitive workflows that deepen client engagement and optimize business performance

Temenos: the leader in banking software offers Temenos Wealth, the go-to software solution for

the Wealth Management industry

Tindecro: its revolutionary no-code strategy designer lets managers create and implement systematic investment solutions to deliver customised portfolios at scale

Velexa: investing platform as-a-service empowering financial institutions and disruptive players to capitalise on the demand for modern and ubiquitous investing solutions by new-generation investors

WealthObjects: offers an intuitive wealth platform for operating a digital, hybrid, or adviser-led wealth management model cost-effectively

A full list of the WealthTech100 and detailed information about each company is available to download for free at www.WealthTech100.com.

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