Urebal Earns Top Ranks in Goodfirms' Best Stock Portfolio and Investment Management Software Categories

Urebal by SoftPak, ranked first in Goodfirms' Best Software categories, highlighting its comprehensive features and industry impact.

BOSTON, MASSACHUSETTS, UNITED STATES, August 13, 2024 /EINPresswire.com/ -- SoftPak— a leading providers of next-generation FinTech solutions—is pleased to announce that its flagship brand, Urebal, has been ranked number one in two categories by Goodfirms, a trusted B2B reviews and rating platform. Urebal won Best Stock Portfolio Management Software and the Best Investment Management Software, showcasing its excellence and efficiency in the financial technology space.

Why? According to Goodfirms, these are what set Urebal on top amid many other competitors available in the market. Upon making an assessment of most factors like user satisfaction, software functionality, ease of use, and overall performance, Goodfirms' evaluationof Urebal highlights these differentiating factors:

Urebal's Comprehensive Capabilities:

Urebal was designed to address the dynamic needs of portfolio and investment managers. The software provides an integrated suite of tools that facilitate efficient portfolio management, risk assessment, and investment analysis. Key features of Urebal include:

• Modeling: Model creation, editing, and maintenance are quick and easy with Urebal, utilizing security attributes and up to five nesting levels for models.
• Households: Manage up to 15 households with a long-term investment strategy, controlling multiple taxable and non-taxable accounts for tax benefits.
• Pair-Wise Swap Rebalancing: Urebal also employs proprietary infinitesimal trades to optimize portfolio allocation, resulting in significant tax and trading cost savings.
• Attributes: Create attribute-based models or accounts, rebalance at attribute or security level, and efficiently minimize trades by rebalancing selective sleeves.
• Restrictions: Attribute level restrictions, security level restrictions, share lot level restrictions, sleeve level restrictions in attribute-based accounts, and account level restrictions in households are all applicable.
• Enhanced Features: Minimum trade size allows for the specification of global security level

MTS, advanced equivalence breakdown, round lot preferences, and sell and buy directions at both global and security type levels.

About SoftPak

SoftPak Financial Systems is the software development company that created Urebal. Founded back in 1994 and specializing exclusively in enterprise software development, software integration and consultant placement for the financial sector. The company is headquartered in Wayland Massachusetts and has 100 employees worldwide, consisting of product and project managers, developers, and QA experts. Their offshore development center, Matrix Systems, is ISO 9001:2015, ISO 27001 (ISMS) certified and working towards CMMI ML 3 with completed Class-C appraisal. SoftPak's clients are among the leading financial institutions in the country. Over the years SofPak has built strong, loyal relationships based on personalized service and close attention to quality and detail with expertise in developing intuitive software solutions to complex business challenges have made it a proven partner for leading global financial institutions.

Recognition by Goodfirms

Customer feedback and expert reviews in a contested selection and evaluation by Goodfirms have ranked Urebal as one of the leading options in stock portfolio management and investment management. Its broad feature set makes the software suitable for the widest varieties of investment strategies. Improved satisfaction rates among users and stability in performance and reliability make it one of the most favored choices among financial professionals. All of these capabilities brought together make Urebal a very reliable tool, helping it become the most preferred in the market.

Industry Impact and Further Prospects

This recognition by Goodfirms comes at the perfect time, as SoftPak is innovating and increasing its line of products. Its top ranking in these categories emphasizes the commitment of Urebal toward the giving of the best solutions for its clients, which best suits the dynamic needs of the financial industry at large.

"We are thrilled to have received this recognition and award from Goodfirms", saidNaaz Schiek, CEO of SoftPak. "It truly is the representation of all the hard work and dedication that our team put in to develop a product that met the users' needs. Rebalancers are an integral part of portfolio management, and having a product widely available to RIAs that gives them flexibility, speed and accuracy at an affordable price point was a priortiy for us." ."

Future Enhancements

Geared up for the future, and ready to launch certain new features and enhancements to Urebal

in the future. The updates would mainly revolve around enhancing the entire user experience and improving their integration capabilities while incorporating advanced technologies such as artificial intelligence and machine learning to gain further insights and predictive analytics.

About Goodfirms

Goodfirms is a B2B research, rating, and review platform that identifies and recognizes the best software and service companies across varied industries. The ratings provided by Goodfirms are backed by in-depth research processing, customer feedback, and expert reviews—giving businesses reliable information to make decisions.

Conclusion

SoftPak's Urebal rebalancing software tops both Goodfirm's Best Stock Portfolio Management Software and Best Investment Management Software lists. The recognition literally speaks volumes as to the capability of the software and its value for finance professionals. SoftPak stays focused on innovation and excellence and continues to work on improving Urebal, innovating to support the changing needs of the financial industry.

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