

Panoramix Named Top Portfolio Management Platform in 2025 T3 Advisor Survey, Nearly Doubles Market Share

Financial advisors' top ranking for seven straight years confirms Panoramix's continued and unwavering commitment to delivering superior service and value

EAGAN, MN, UNITED STATES, March 10, 2025 /EINPresswire.com/ -- Panoramix Financial continues to set the standard for portfolio management platforms, earning the highest user satisfaction score in its category in the 2025 T3 Technology Tools for Today (T3) Survey. With an outstanding average user satisfaction score of 9.42, Panoramix maintains its position as the top-rated portfolio management platform for the seventh consecutive year. The firm also achieved significant growth, nearly doubling its market share to 2.35%, as revealed this week at the T3 conference in Dallas, TX.



Panoramix Logo

That exceptionally high average user rating (9.42) also earned Panoramix a place on the

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Chris Hastings

“Software All Stars” list highlighting those solutions with extraordinary ratings (defined as 8.0+ by the survey) in their category. This marks the fourth consecutive year where Panoramix has topped 9.0 for its rating, a first for any portfolio management platform.

“At Panoramix, our mission is to support independent financial advisors by providing a robust, flexible software platform with premium support at the best value,” said Chris Hastings, CEO of Panoramix. “Our team is incredibly proud of this recognition which reflects our unwavering

commitment to delivering a robust, intuitive, and cost-effective platform for independent advisors. To earn the industry's top satisfaction score for seven straight years is a testament to the trust advisors place in Panoramix and our team's dedication to helping them succeed."

In addition to their success in the portfolio management category, Panoramix Pro, the company's add-on Trading and Re-balancing tool, was recognized as a Mighty Mite in the survey, signifying its growing user adoption and effectiveness. Panoramix Pro also increased its market share over last year's numbers, further demonstrating the platform's expanding influence in the advisor technology space.

The annual T3 Survey, a widely respected benchmark for advisor technology, provides key insights into the tools and platforms shaping the industry. Of the 28 platforms in this year's survey, only Panoramix achieved a score exceeding 9.0 and the average held at 7.41, placing Panoramix significantly above the rankings curve. One of the platforms closest to Panoramix in the rankings saw their market share drop by 57%. For Panoramix to grow market share by 96% this year and maintain its top ranking is remarkable. Complete survey results available from the [T3 Technology Hub](#). Look for "T3/Inside Information Survey 2025." Industry experts Joel Bruckenstein and Bob Veres collaborate on the survey.

Panoramix's continued recognition in the T3 Survey underscores its commitment to innovation and customer focus. The platform is designed to be feature-rich yet cost-effective, ensuring advisors can efficiently manage their businesses without unnecessary complexity or expense. Through strong partnerships and integrations, Panoramix provides a flexible, multi-custodial solution that fits seamlessly into an advisor's existing tech. A great option for advisors who adopt a best-in-class approach when choosing tech for their firm.

For more information about Panoramix and its award-winning solutions, visit www.panoramixfinancial.com.

About Panoramix™

Developed in 2013 by Sapphire Software Services, Inc., Panoramix™ provides portfolio management and reporting software for RIAs and financial advisors. Specializing in billing and performance reporting, the Panoramix platform is multi-custodial and, with its wide array of partners and integrations, is flexible enough to integrate seamlessly into an existing tech stack, while still being robust enough to stand on its own. Panoramix is industry-recognized as a [Kitces' Best Value](#) (2023) and a top performer on the T3 Inside Information Survey seven years running (2019-2025). For more, see www.panoramixfinancial.com.

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