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The Robo Report® Edition 36 Covering the 2nd Quarter of 2025 and 15th Edition of the Robo Ranking® Have Been Released

MARTINSVILLE, NJ, UNITED STATES, August 21, 2025 /EINPresswire.com/ -- We are pleased to announce the publication of the 36th edition of The Robo Report®, covering the second quarter of 2025, as well as the 15th edition of The Robo Ranking®, stated Ken Schapiro, Founder of Condor Capital Wealth Management.

This latest edition of The Robo Report® examines the portfolios and performance of 32 accounts from 23 different robo-advice providers. Meanwhile, the Robo Ranking® Summer Edition dives deep into the qualitative aspects of each platform, grading providers on more than 45 individual metrics. These are grouped into larger categories such as features, financial planning capabilities, user experience, access to live advisors, conflicts of interest, transparency, minimum investment requirements, costs, and overall performance.

Robo Ranking Highlights

Best Overall Robo Advisor
- Winner: SoFi Automated Investing
- Runner-up: Fidelity Go

SoFi Automated Investing earns the top spot thanks to a feature set that feels purpose-built for everyday investors. With a $50 account minimum and a straightforward 0.25% advisory fee, the platform combines strong risk-adjusted returns with accessible pricing and a growing planning ecosystem. SoFi's 9.28% annualized five-year return topped its normalized benchmark by 0.83%, while unlimited CFP-credentialed planner access for SoFi Plus members and consolidated financial dashboard views make it our Best Overall Robo Advisor.

Fidelity Go follows as the runner-up, standing out for its competitive 0.35% management fee, no minimum investment requirement, and robust financial planning tools. The platform delivered exceptional performance by outperforming its normalized benchmark by 0.78% over the trailing five-year period, aided by strategic municipal bond allocations and large-cap positioning.

Best Robo for Performance at a Low Cost
- Winner: Fidelity Go
- Runner-up: Wealthfront

Fidelity Go's strategic allocation to municipal bonds and bias toward large-cap equities drove superior risk-adjusted returns over the five-year period. Wealthfront claims the runner-up position, benefiting from its dedicated energy holding during prolonged inflation periods and municipal bond allocations that outperformed corporate bonds over this timeframe.

Best Robo for First-Time Investors
- Winner: Wealthfront
- Runner-up: Fidelity Go

Wealthfront's transparent 0.25% fee, advanced digital platform, and intuitive planning features make it ideal for beginners comfortable with a fully digital experience. The service's free, in-depth planning tool and automated portfolio management, including tax-loss harvesting, provide a streamlined approach for new investors. Fidelity Go's runner-up position reflects its combination of low costs, no management fee on the first $25,000, and strong long-term performance.

Best Robo for Digital Financial Planning
- Winner: Empower (formerly Personal Capital)
- Runner-up: Wealthfront

Empower maintains its leadership position with comprehensive digital planning tools that enable multi-goal financial planning, outside account aggregation, and sophisticated retirement analysis. The platform's Investment Checkup feature and ability to model complex scenarios make it the top choice for digital planning. Wealthfront remains a strong contender with its highly customizable planning tool and Self-Driving Money feature that integrates spending and saving habits with long-term goals.

Best Robo for Complex Financial Planning
- Winner: Vanguard
- Runner-up: Empower

Vanguard's hybrid advice model offers access to live financial advisors at $50,000 minimum for just 0.30% in management fees, with dedicated advisors available at $500,000. This provides comprehensive planning at a fraction of traditional advisory costs. Empower claims second place, combining sophisticated digital tools with live human advisors (starting at $100,000), plus access to advanced investment options including SRI portfolios, direct indexing, and alternative investments for larger accounts.

Robo Report Highlights
- Year-to-Date Performance Winners: Interactive Advisors, Citizens Bank SpeciFi, Citi Wealth Builder
- Higher international allocations and corporate credit exposure drove outperformance as

market themes reversed from previous periods.
• One-Year Performance Winners: Betterment Climate Impact SRI, SigFig, Vanguard Digital Advisor
• Sustained focus on domestic large-cap equities and municipal bond strategies delivered consistent long-term outperformance.
• Eight-Year Performance Winners: SoFi, Fidelity Go, Wealthfront
• Sustained focus on domestic large-cap equities and municipal bond strategies delivered consistent long-term outperformance.

These results reflect our Normalized Benchmarking approach, which allows for a consistent comparison of globally diversified portfolios. Detailed methodology, along with the full Robo Report® and Robo Ranking®, can be accessed for free at condorcapital.com/the-robo-report.

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