

OnPointe Software Launches ProxyFinder.net, the Industry's First and Only Proxy Finder and Creator

OnPointe Software announces the launch of ProxyFinder.net, a solution that solves the handling of short-duration investment assets in portfolio analysis.

FORT MYERS, FL, UNITED STATES, October 1, 2025 /EINPresswire.com/ -- [OnPointe](#) Software, a leading provider of financial software for advisors, announces the launch of [ProxyFinder.net](#), a groundbreaking solution that finally solves one of the industry's most frustrating and compliance-challenged problems: handling short-duration investment assets in portfolio analysis.



For decades, advisors have been forced to accept inaccurate “exclude and rebalance” methods or truncated lookbacks when portfolios contain assets with limited data history. Both approaches compromise accuracy, misrepresent client portfolios, and create compliance risks. OnPointe’s [Proxy Finder](#) Tool eliminates this problem by delivering the most accurate proxy methodology available.

“Advisors can stop being frustrated with risk tolerance software like Riskalyze/Nitrogen, Hidden Levers, and others when it comes to short-duration assets. With the click of a button, a short-duration asset can be extended to over 200 months of data, which expands the portfolio’s historical data and will lead to more accurate risk scores,” said OnPointe Software Co-Founder, Rocco DeFrancesco, JD, CAPP, CMP.

With ProxyFinder.net, advisors simply input a short-duration asset and the system does the rest. First, the Proxy Finder identifies the closest-fit proxy using correlation, beta, and R-squared. Then, the Proxy Creator applies OnPointe’s proprietary modeling to extend return histories, generating a new, highly accurate dataset. This breakthrough approach provides advisors with a reliable history of returns and ensures client risk scores are based on meaningful long-term data.

Key benefits of Proxy Finder Tool include:

- Automatic search for the closest-fit proxy based on correlation, beta, and R-squared
- Proprietary modeling is used to create accurate extended return histories
- Compliance-friendly methodology with transparent data
- Time-saving alternative to manually hunting for proxies
- Seamless use within OnPointe Software or can be used alongside other risk software

This launch reinforces OnPointe's commitment to solving the problems other platforms ignore, empowering advisors with the accuracy, efficiency, and compliance support they need.

About OnPointe Software

OnPointe Software empowers financial advisors with market-calibrated investment risk analysis, dynamic retirement income planning, and cutting-edge tools like ProxyFinder.net. By combining real-world risk methodology with intelligent innovation, OnPointe enables advisors to deliver precision guidance tailored to each client's goals.

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