

Panoramix™ Expands Trading & Rebalancing Capabilities with One-Sided Trading and Household Rebalancing

New Panoramix Pro enhancements give advisors greater flexibility and visibility when managing portfolio allocations

EAGAN, MN, UNITED STATES,
September 2, 2026 /EINPresswire.com/
-- Panoramix™, a portfolio management and reporting platform for independent registered investment advisors (RIAs) and independent financial advisors, announces expanded Trading & Rebalancing tools available through Panoramix Pro with the addition of One-Sided Trading and Household Rebalancing.



Panoramix Logo

These latest enhancements give advisors greater flexibility in how they bring client portfolios back toward target allocations while preserving the advisor's ability to review and control trading decisions. They mark the first phase of a planned investment in Panoramix Pro, which combines all of the capabilities included with a standard Panoramix license with integrated Trading & Rebalancing.

With One-Sided Trading, advisors using group-based models can rebalance higher-level allocation groups without fully rebalancing every individual holding within those groups. Panoramix can keep trades one-directional within an Asset Class, Security Type, or Asset Type group, buying into groups that need to grow and selling from groups that need to shrink. This approach can help advisors bring the portfolio's broader allocation back toward its target while avoiding trades generated solely to return every underlying position to its individual target.

Panoramix Pro now also supports Household Rebalancing, allowing an advisor to rebalance toward a target allocation across a household while retaining flexibility at the individual account and position level. Advisors can specify an allocation within a particular account or exclude an account or position from the rebalance, allowing those account-level requirements to be addressed before the remaining household assets are rebalanced toward the household's target allocation.



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*Chris Hastings, Panoramix
CEO*

A new Show My Work screen adds greater visibility into the Trading & Rebalancing process. When rebalancing at the account or household level, with or without the One-Sided Trading option enabled, advisors can review the actions behind the result while retaining control over trading decisions.

"Trading and rebalancing isn't simply about arriving at a result. Advisors need flexibility in how they implement their investment approach, along with the ability to understand the process and maintain control over the

decisions they make," said Chris Hastings, CEO of Panoramix. "These enhancements give advisors more flexibility to manage allocations across accounts and households while providing greater transparency throughout the rebalancing process."

The enhancements were included as part of Panoramix version 3.0.70, released August 6, 2026, as Panoramix moves forward with targeted investments in Panoramix Pro's Trading & Rebalancing tools and features.

As part of this broader focus on Trading & Rebalancing, Panoramix Pro also supports fractional-share trading for advisors who custody with Schwab Advisor Services™. Upon launch of fractional-share trading at Schwab Advisor Services, Panoramix was immediately able to support fractional shares within its existing Trading & Rebalancing workflows, without requiring advisors to use separate tools or manual workarounds.

Panoramix Pro adds integrated Trading & Rebalancing to all of the capabilities included with a standard Panoramix license. Trading & Rebalancing tools include generating and submitting trades, bulk and individual account trading, trading rules, rebalancing, cash allocation, and other trading workflows. Panoramix Pro can submit trading files to most custodians, submit directly through APIs to several custodians, and submit through a FIX connection for most custodians.

For more information about Panoramix Pro or to schedule a demonstration, contact sales@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 eight years running

(2019–2026). For more, see www.panoramixfinancial.com.

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