Market Analysis and Investment Ideas from the DWA Platform

An advisor to the investment community and a pioneer in smart beta strategies, the DWA Technical Research Platform from Dorsey, Wright and Associates, a Nasdaq Company, empowers clients with analysis and tools to identify and implement investment ideas based on objective, unemotional data.

Successful investing requires a clear and consistent strategy. Point & Figure Charting and Relative Strength Analysis are cornerstones of the Dorsey Wright methodology. Investors rely on unbiased, unemotional and objective data, which can be used as the foundation for an investment strategy, or in conjunction with fundamental research. Studies have shown that investors tend to achieve subpar performance because they allow emotion to take over, and fail to adhere to a consistent set of rules.

THE DWA PLATFORM

Accessible via Thomson ONE Wealth, the DWA Platform is an easy-to-use technical research platform that helps to identify the Relative Strength and shifting momentum across asset classes, and down to the sector, industry, security, and fund level.

Thousands of advisor practices of all sizes leverage DWA to automate the portfolio management process, and investigate and make recommendations across a broader range of financial products.

The platform helps to:

- Identify top-performing asset classes, funds, and securities
- Guide investment decisions via 100+ model portfolios
- Proactively monitor risk and price levels for global stocks, ETFs, indices, and mutual funds

A U.S.-based analyst team strengthens the platform experience by providing one-to-one or one-to-many consultations, as well as daily research, that together provide valuable insight and actionable intelligence. Today, the DWA Platform directly influences 78% of the investment decisions made by its users.

WHAT IS RELATIVE STRENGTH ANALYTICS?

Relative Strength, the measurement of how one security performs in comparison to another, is a key concept within Dorsey Wright’s methodology. The same logic can be applied to sector analysis, asset class evaluation, mutual funds, ETFs, commodities, fixed income, and even foreign countries. A relative strength matrix compares a large quantity of investment options to one another – and reveals which is strongest.
TECHNICAL RESEARCH FOR FINANCIAL PROFESSIONALS

GUIDED MODEL PORTFOLIOS

The DWA Platform provides more than 100 model portfolios targeting exposure to sector rotation strategies, asset class allocation, international country rotation, and factor-based approaches such as high dividend income and low volatility. Its model portfolio offerings include strategies built with ETFs, U.S. stocks and International-listed Equities and ADRs. These offerings can be implemented in various account types to help service (even) smaller accounts in anticipation of fiduciary reform.

PORTFOLIO CONSTRUCTION AND ALLOCATION

Screening capabilities in the platform rank macro asset classes based on developing leadership trends within the global capital markets. The objective guidance enables users to properly allocate portfolios across all major asset classes in an effort to emphasize strength wherever it exists and shifts. U.S. Equities, International Equities, Commodities, Global Currencies, Fixed Income and Cash are evaluated daily to identify dynamic developments across investment genres, as well as within them.

PORTFOLIO MANAGEMENT AND EVALUATION

The “Your Portfolio” tool in the DWA Platform makes portfolio analysis and management more efficient. Users can set up one or more custom portfolios within the system, which allows the platform to “watch the store” on their behalf. This tool has robust alerting features, so it becomes easy to watch a broad array of investments – and be alerted when significant price movements or technical changes occur.

DAILY MARKET RESEARCH

The Daily Equity Report, written by Dorsey Wright’s team of analysts, provides daily commentary on timely technical developments across all major segments of the global capital market. This includes major market evaluation and sector rotation observations, and investment recommendations across individual securities, ETFs, mutual funds, and options.

EXPANSIVE GLOBAL CHARTING & ALERT SYSTEM

Proactively monitor risk with Point & Figure charts and technical analysis commentary on over 28,000 global stocks, 5,000 ETFs/Indices, and 19,000 mutual funds. Users can easily compare performance of multiple securities, set price level or technical activity alerts so they are notified when significant movements occur, and use a variety of other tools to get a full technical picture of any security in the database.

For more information, visit thomsonreuters.com

Send us a sales inquiry at: financial.thomsonreuters.com/sales
Read more about our products at: financial.thomsonreuters.com
Find out how to contact your local office: financial.thomsonreuters.com/locations
Access customer service at: my.thomsonreuters.com

© 2016 Thomson Reuters  S041979/12-16