



Next-Generation Decision Support Software
for Active Fund Managers



Essentia's behavioral analytics service empowers professional investors to play to their strengths, avoid their weaknesses, and make fewer unconscious errors.

As assets flow into passive vehicles, the pressure on active managers to prove their skill has never been greater.

The key to competing in this new world is technology - not to replace human investors, but to empower them to do more of what they're good at and less of what they're not.

Essentia's behavioral analytics platform uses machine learning technology to analyze the trade data you're already collecting, to uncover relevant behavioral patterns and to deliver insights that cut to what really matters, when it matters.

There's a reason that "Moneyball" is now standard practice in professional sports: data-driven feedback loops are proven to drive continuous improvement.

We all have behavioral biases. Essentia makes it possible to identify those biases, quantify their impact, and mitigate them with proactive, personal Nudges.

So far, we've helped clients uncover an average of 0.50% of excess return per annum (and in some cases, far more) that had previously been given up to behavioral bias.

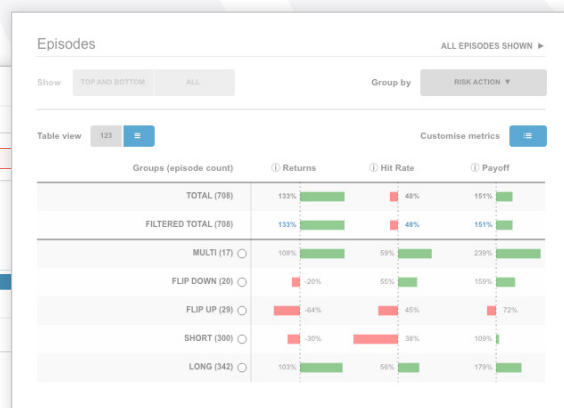
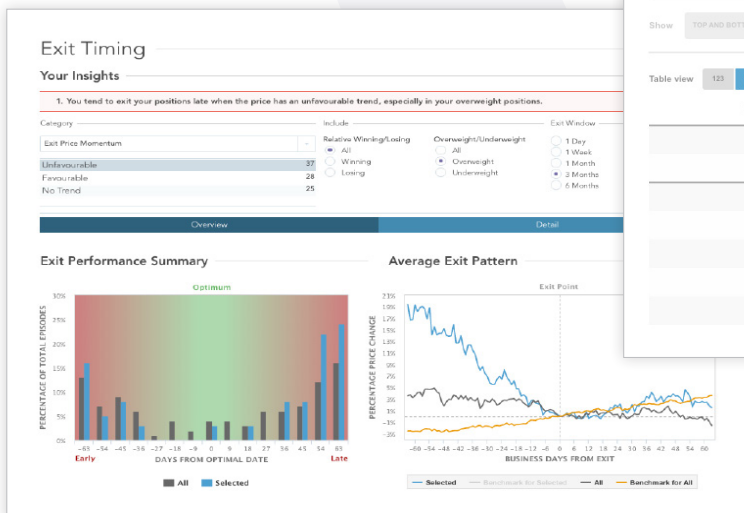
Whether you're a portfolio manager, an investment team leader or an investment oversight professional, Essentia gives you more clarity with less effort - so you can focus your energy on what you do best: making decisions.

"The investor's chief problem - and even his worst enemy - is likely to be himself."

Benjamin Graham



Essentia Insight™



Explore investment skill by position type, size, sector, country, risk action, price momentum, market direction, holding period, entry/exit day, etc - in aggregate and at the position level.

Essentia for Portfolio Managers & Analysts

Using nothing but basic historical trade and holdings data, the Essentia Insight™ service provides PMs with crucial information about their own behavioral tendencies via personal, confidential consultations and automated nudges that call attention to current positions that may be falling prey to old habits.

Essentia's nudges provide measurable ROI (so far, 20x, on average, in as little as 6 months).

The Essentia Insight service requires no additional work on the part of the PM.

But for investors who are ready to supercharge their investment processes, we offer Essentia Note™, a productivity tool with a twist. Essentia Note makes it easy to privately and securely capture 'the why' behind each investment decision, then set alerts and reminders based on time, price and behavioral patterns.

Essentia Note brings demonstrable structure to the investment process, relief to the busy mind, and unprecedented clarity to the analysis of what drives your best and worst decisions.

Essentia Note also makes it easy for analysts and junior fund managers to run paper portfolios, with all the same productivity and analytical benefits as PMs, instilling best-practice standards from day one.

Essentia for Investment Team Leaders

The leader of any team needs clarity around which players are skilled and what, in which contexts - that's what Essentia Insight provides to CIOs and Heads of Equities.

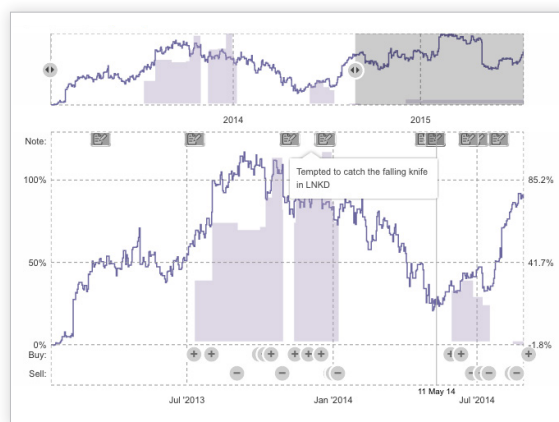
Whether conversing privately with PMs, leading investment committee discussions or presenting to investors, investment team leaders who work with Essentia can cut straight through to understanding what really impacts performance. Interactive data visualizations make it possible to explore lines of questioning quickly and on the fly, while private consultations provide highlights and reports for sharing both internally and externally.

Essentia for Investment Oversight

The Essentia platform turns your existing performance analytics team into a center of excellence in behavioral analysis, with no additional headcount required.

Essentia provides training and consulting designed to nurture in-house expertise, and empower investment oversight professionals to contribute directly to measurable alpha improvement.

Essentia Note™



Accurately and easily capture 'the why' behind each investment decision.

Data Security is Gospel

Essentia uses Amazon's AWS cloud data infrastructure. Conforming to multiple internationally recognized standards including SOC 1/SSAE 16 and ISO 27001, AWS is widely recognized as amongst the most secure server infrastructures in the world. Here, we structure our clients' data within a high security, purpose-built architecture where it can be segregated and/or held in a specific jurisdiction.

This is just one of the reasons why some of the world's largest fund management firms already trust Essentia with their most sensitive information.

“Winning in today’s increasingly competitive markets requires each investor and every firm to operate at their very best. Just as in the world of sports, the top competitors are always searching for ways to be even better, the best investors are all looking for ways to improve because small gains can make the difference.

Essentia’s technology enables exactly that, by helping skilful investors apply the insights of behavioral finance principles to the real world of investment decision-making.

While the broad market is increasingly embracing index funds, the best fund managers can and should go the other way and ‘double down’ on their skills. Indeed, top fund managers should be using technology to raise their games in this way and create for themselves what competitors might call an ‘unfair competitive advantage’.”

Charles D. Ellis
Founder, Greenwich Associates
Author of “Winning the Loser’s Game”
Essentia Non-Executive Director



About Essentia

Essentia’s behavioral analytics platform uses machine learning technology to identify patterns in past investment behavior and help human investors make superior investment decisions in the future.

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