

Australian Fund Monitors Pty Ltd

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BFP Member Benefit & Special Pricing Arrangement

Business Name

FundMonitors.com

Website:

www.fundmonitors.com

Synopsis of Business

www.FundMonitors.com was established in 2006 to provide HNW investors and Independent Financial Advisors an online source of independent information on the managed fund sector in Australia. Since then it has grown to include information comparing over 700 actively managed funds. There is no advertising, and the information is presented in a series of formats, ranging from one page Fact Sheets suitable for inclusion in SAO's, through to full Fund Profiles and in depth Research Reports.

Product/Service Description

Compare and Research over 700 Managed Funds:

Access to independent, easy to use, comparative performance information and analytics on managed funds is essential when advisors are providing client advice. However, collating and researching the information, and keeping it up to date, is a time consuming and potentially expensive exercise. This is particularly true for boutique advisory firms who may not have access to the internal research resources and departments of larger dealer groups.

The FundMonitors.com data base is powerful, yet easy to use.

Users can search for individual funds to see a variety of Profile views with descriptions of the fund manager and the fund's strategy, historical monthly performance data, and a variety of performance charts and risk analytics. Where available the manager's monthly performance report and offer document are also available.

Alternatively, funds can be sorted by one of 15 peer groups, or by investment strategy, with tables sorted by performance, risk analytics, investment terms, research ratings and platform availability.

Each fund's performance data is updated every month, and the website includes a series of easy to use but powerful analytical tools, including:

- Peer Group tables,
- Watch Lists,
- Portfolios and
- Custom Reports.

In-depth FACTORS Research Reports are also available on selected funds.

BFP Pricing Arrangement

FundMonitors.com operates both a free version and a subscription service.

At a basic level there is a “Forever Free” version which provides limited information to allow users to view the site, but Financial Advisors would find this of limited use.

There are 2 standard subscription levels available, each with a 30 day Free Trial:

1. Lite: Suitable for self directed and HNW Investors - \$348 per annum or \$33 per month
2. Premium: Suitable for Professional Investors and Advisors - \$1,348 per annum, or \$120 per month.

We would like to offer BFP Members a discount of 20% off the above annual subscription, and 10% off the monthly subscription.

Process to Access Offer

Go to www.fundmonitors.com or follow [this link](#) to register or subscribe and enter the following Code: BFP2022

Or email contact@fundmonitors.com for further details and a guided tour of FundMonitors.com

Business Representative Details

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