

The **Evolution** of **Digital Experiences** in Asset & Wealth Management

Keynote Speakers:



John Hennessey
Senior Partner, Alpha FMC



Deepak Arora
Enterprise Architect, Asset & Wealth
Management Consulting, Alpha FMC



Steve Dale
UX & Digital Experience Director

Panel Discussion:



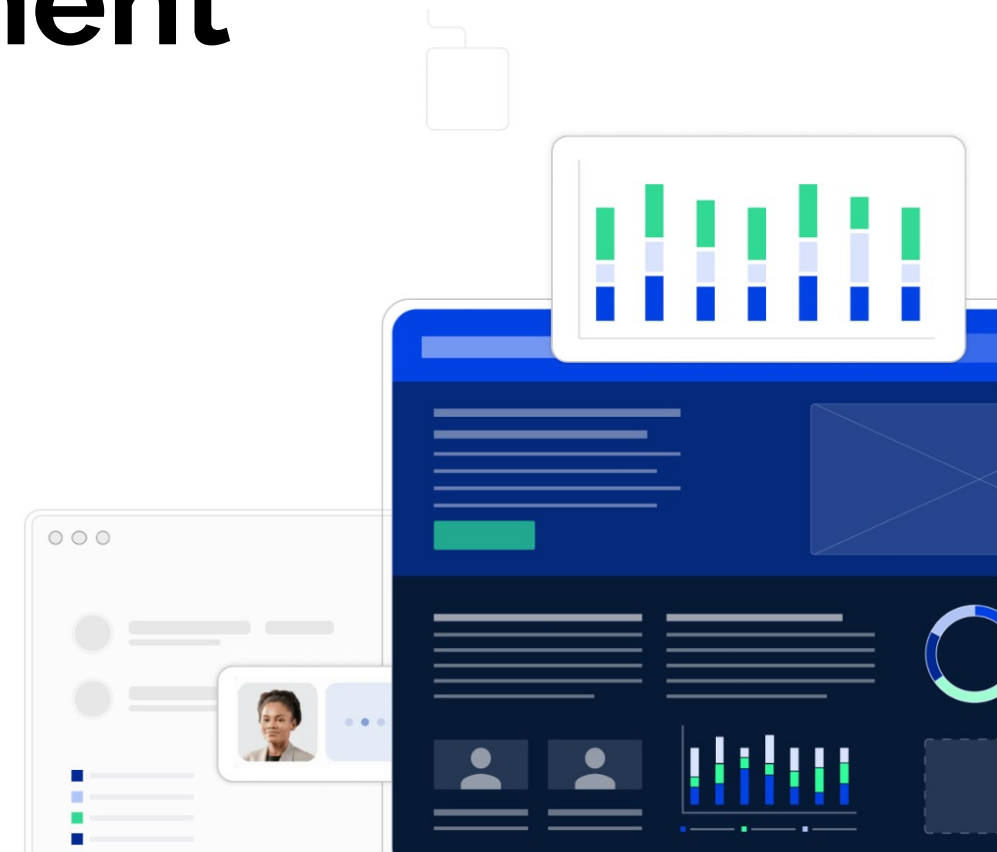
Anji Kang-Stewart
Managing Director Global Head of
Marketing, Man Group



John Hennessey
Senior Partner, Alpha FMC



Tom Hughes
Head of Marketing, Gemcorp Capital



Sponsors:

SITEBOX

KURTOSYS

Alpha



Today's Host: Paul Fawcett
Co-Founder @ SiteBox

Today's Keynote sessions:



Paul Fawcett
Co-Founder
SiteBox

1 Leveraging AI

Explore ways to **leverage AI & personalisation** to enhance the **client experience**

John Hennessey
Senior Partner – Alpha FMC

Deepak Arora
Enterprise Architect – Alpha FMC

2 What's Next in UX?

How to adapt your **digital experiences** with evolving **client expectations**

Steve Dale
Director of UX & Digital Experience

Keynote 1:

Leveraging AI

Explore ways to **leverage AI & personalisation** to enhance the **client experience**



John Hennessey

Senior Partner, Alpha FMC

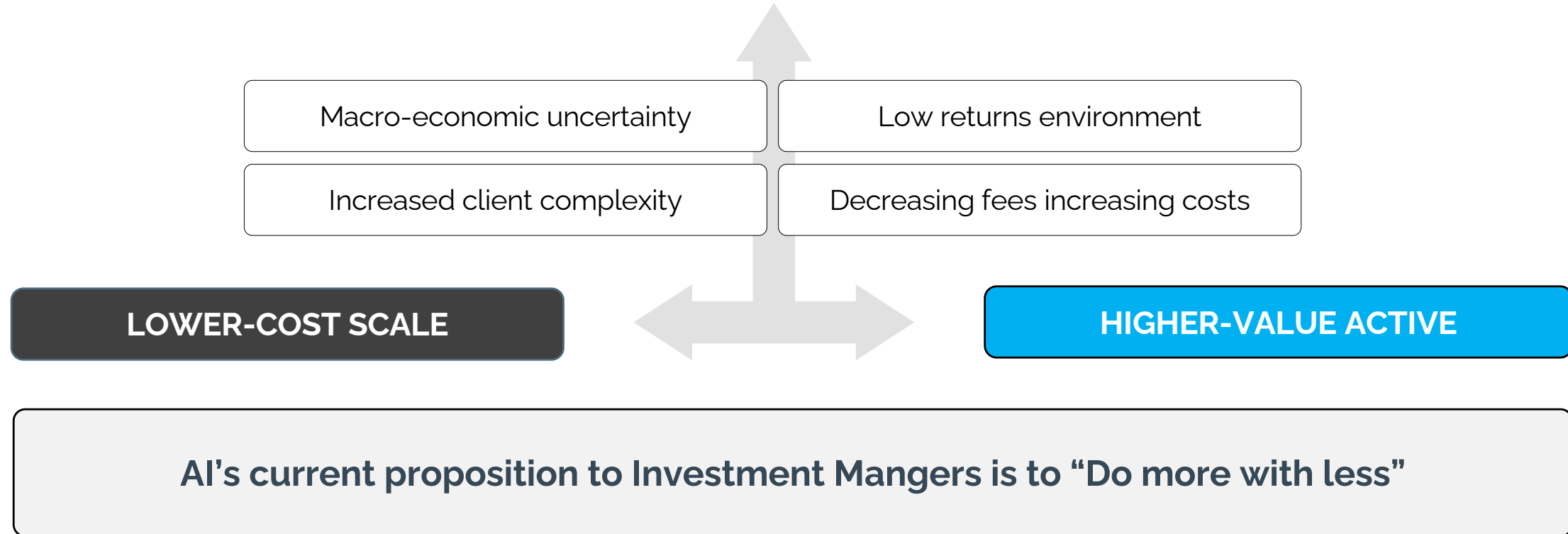


Deepak Arora

Enterprise Architect, Asset & Wealth
Management Consulting, Alpha FMC

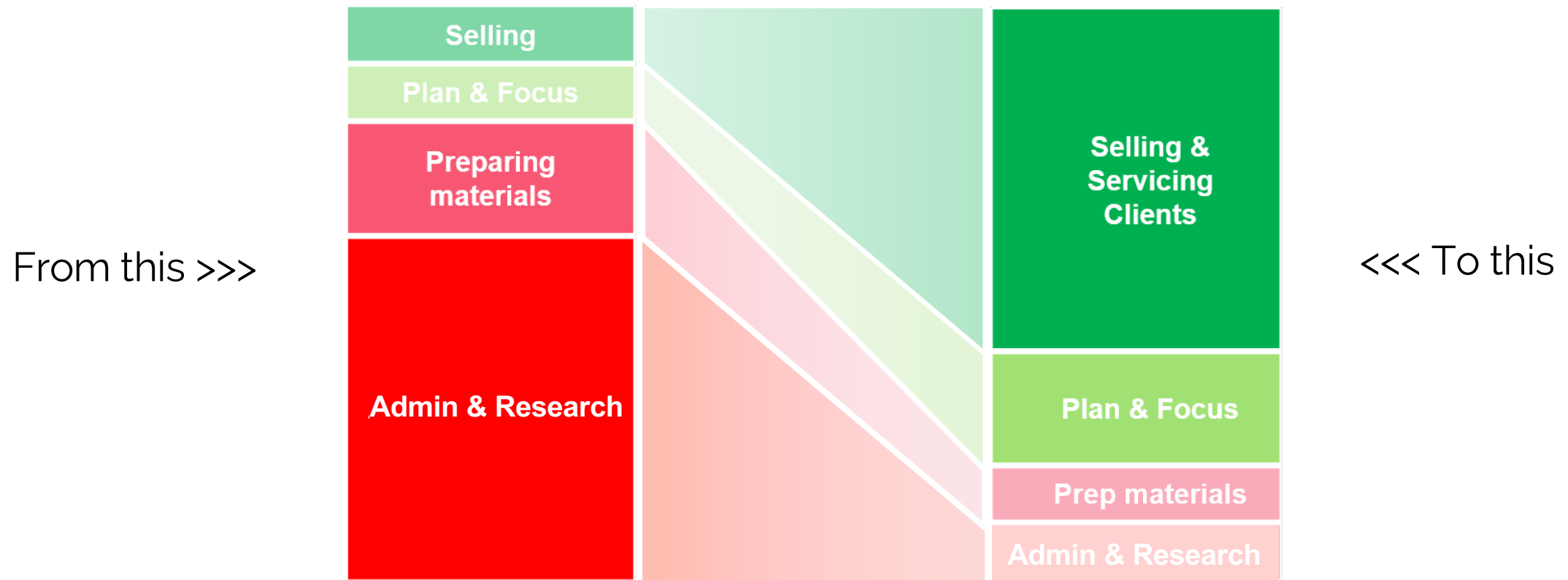
Putting AI in the context of our industry

Managers are facing unprecedented headwinds



Our perspective | the underlying client insight objective

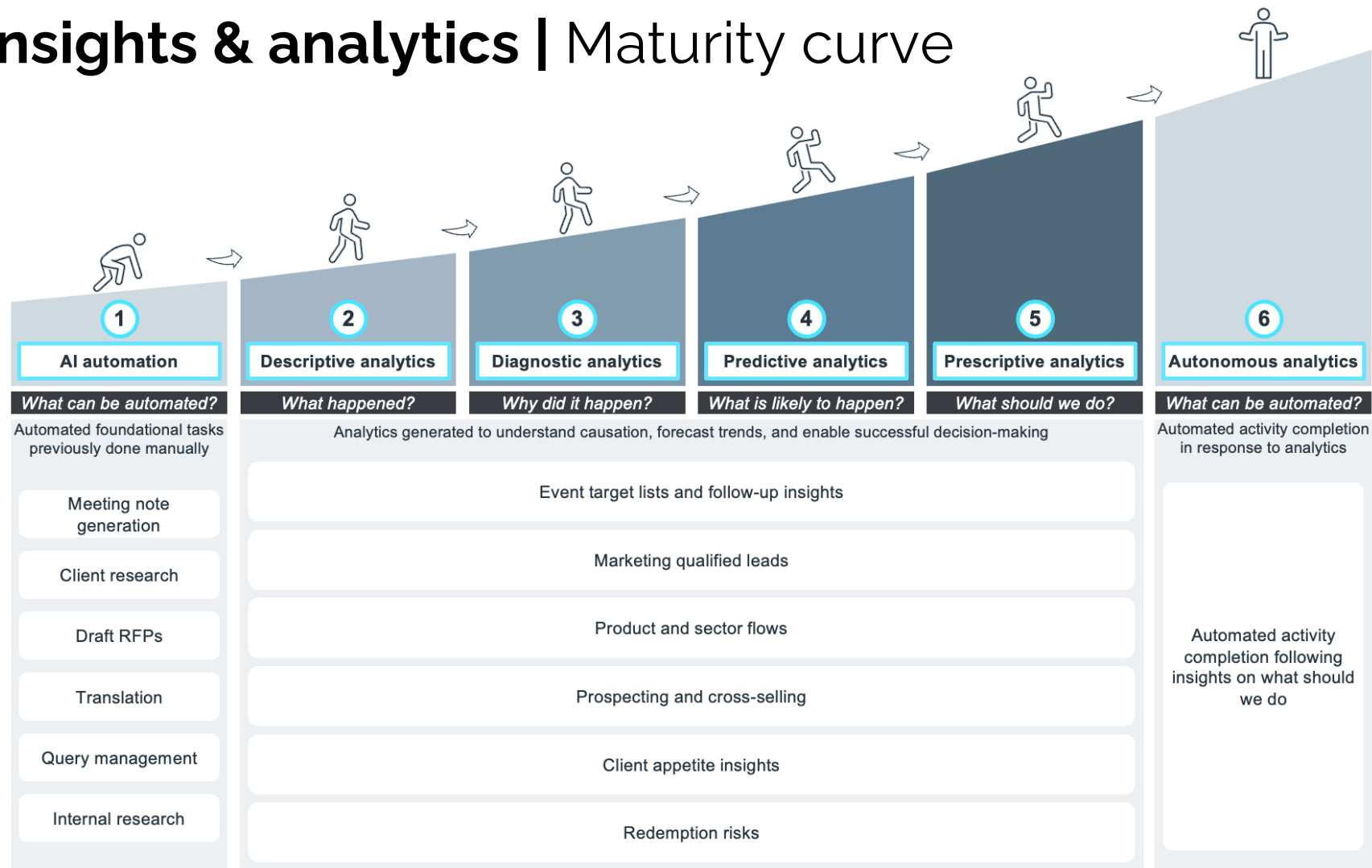
The objective is simple – free time up to do the important stuff



Client insights & analytics | Maturity curve

Industry leaders that have built a foundational and scalable CRM and data architecture are now taking advantage of it by investing in data science, analytics, and AI to reduce the time spent on admin and research, improve the client experience and achieve better outcomes for the firm.

Client insights & analytics | Maturity curve





Demo

18 March 2025

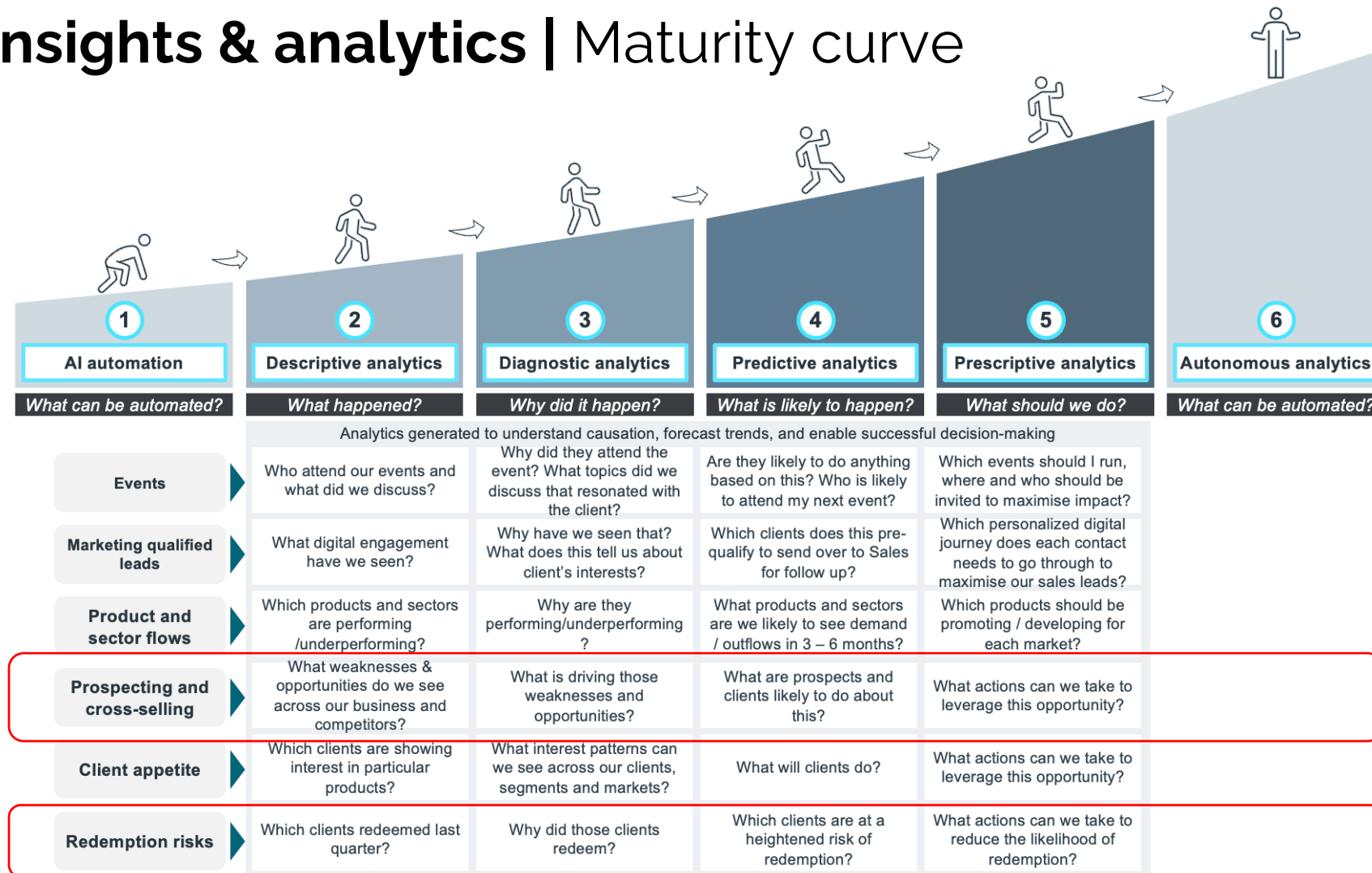
The **evolution** of Digital Experiences
in **Asset & Wealth Management**

SIT  **BOX**™

KURTOSYS

 **Alpha**

Client insights & analytics | Maturity curve





John Hennessey
Senior Partner, Alpha FMC



Deepak Arora
Enterprise Architect, Asset & Wealth
Management Consulting, Alpha FMC

Questions

Keynote 2:

How to adapt your digital experiences with evolving client expectations

What's next for UX?



Steve Dale

UX & Digital Experience Director

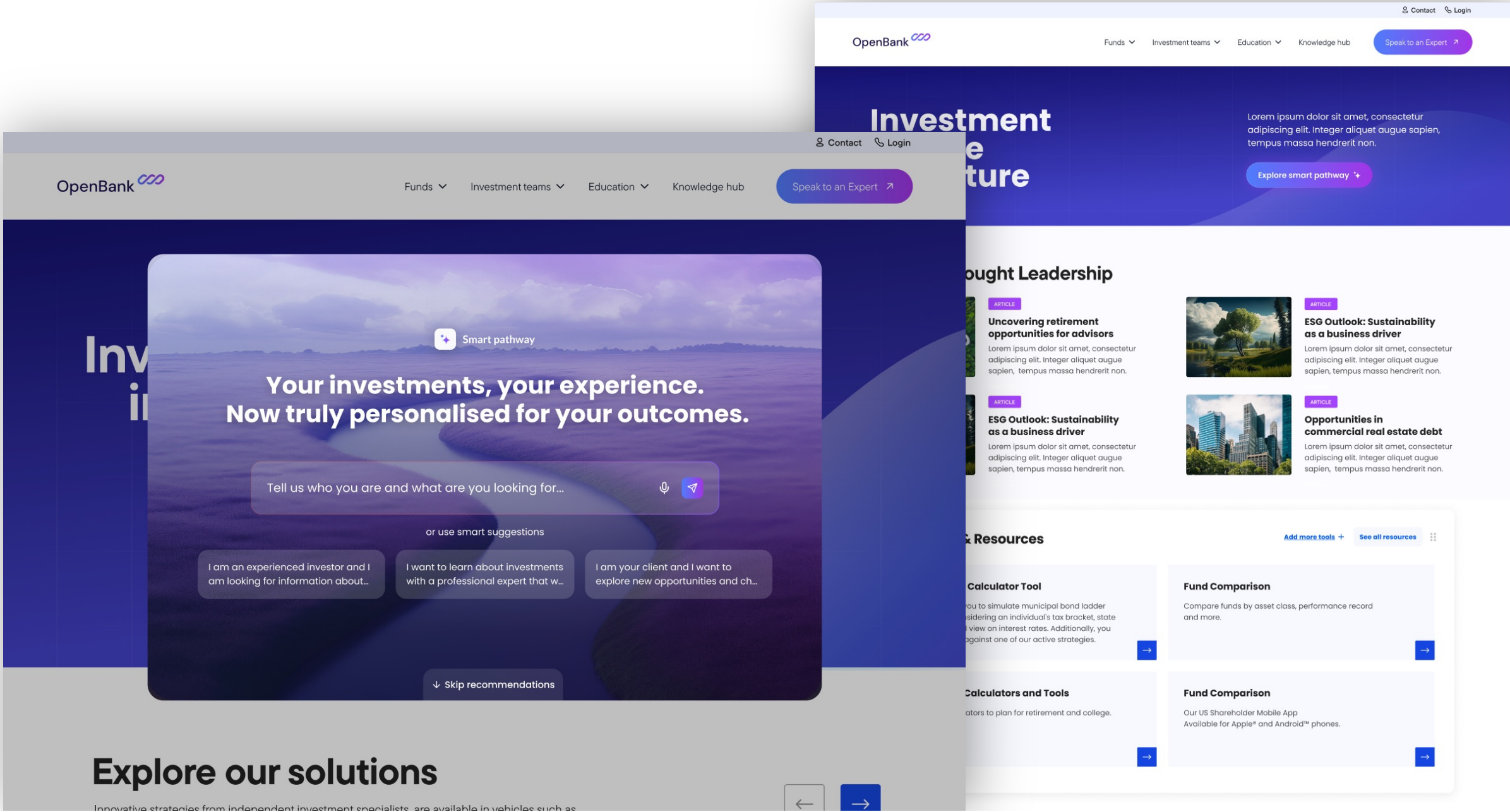
- Been creating website & application experiences for over 15 yrs
- Worked with over 250+ financial services & fintech and B2B brands making those digital channels customer centric



Design Sprint (1 day) : Explore concepts of where UX in Asset Managers websites could evolve;

1. Reimagining the **attestation** to initiate a more intelligent response for the user
2. A more responsive way to get to the info users want in a **fund explorer**
3. Can we create a smart way of delivering **thought leadership & Insights**
4. Giving Advisors / Intermediaries a better experience to service their end customers – e.g. **advisor portal**
5. Making **financial education** more intuitive

Reimagining Investor Attestation



A Smart Fund Centre Journey

Contact

Login

OpenBank

Funds

Investment teams

Education

Knowledge hub

Speak to an Expert

Smart explorer

Hello, John

How can I help you today?

Suggested

Would you like me to send you a PDF of this fund?

Can I compare this fund with another fund for you?

Would you like to create a hypothetical portfolio?

Ask

Product help

Navigate the platform

Ask smart explorer

Smart explorer can make mistakes. Check for accuracy.

Explore our funds

Innovative strategies from independent investment specialists, are available in vehicles such as separate accounts, U.S. 40 Act funds, UCITS, SICAV, private funds and other structures.

Our Managers

Your Strategy

Fund Name	Currency	NAV ¹	NAV Change ¹	Feb-24 / Feb-25	Feb-23 / Feb-24	Feb-22 / Feb-23	Feb-21 / Feb-22	Performance Inception Date	Fact Sheet
Disruptive Commerce Fund - A (acc) USD	USD	\$6.44	-3.01% \$-0.20	18.69	35.86	-25.66	—	15/10/2021	PDF
Diversified Balanced Fund - A (Ydis) EUR	EUR	€12.33	-0.72% €-0.09	9.19	8.40	-6.14	9.67	13/02/2006	PDF
Diversified Conservative Fund - A (Ydis) EUR	EUR	€9.99	-0.40% €-0.04	4.19	4.73	-11.67	-0.15	13/02/2006	PDF
Diversified Dynamic Fund - A (acc) EUR	EUR	€17.64	-0.90% €-0.16	12.32	11.36	-4.39	16.62	13/02/2006	PDF
ESG-Focused Balanced Fund - A (acc) EUR	EUR	€10.83	-0.64% €-0.07	11.15	14.79	-7.27	—	15/07/2021	PDF
Euro Government Bond Fund - A (Ydis) EUR	EUR	€9.72	0.10% €0.01	3.07	4.72	-13.69	-5.65	08/01/1999	PDF
Disruptive Commerce Fund - A (acc) USD	USD	\$6.44	-3.01% \$-0.20	18.69	35.86	-25.66	—	15/10/2021	PDF
Diversified Balanced Fund - A (Ydis) EUR	EUR	€12.33	-0.72% €-0.09	9.19	8.40	-6.14	9.67	13/02/2006	PDF
Diversified Conservative Fund - A (Ydis) EUR	EUR	€9.99	-0.40% €-0.04	4.19	4.73	-11.67	-0.15	13/02/2006	PDF
Diversified Dynamic Fund - A (acc) EUR	EUR	€17.64	-0.90% €-0.16	12.32	11.36	-4.39	16.62	13/02/2006	PDF
ESG-Focused Balanced Fund - A (acc) EUR	EUR	€10.83	-0.64% €-0.07	11.15	14.79	-7.27	—	15/07/2021	PDF
Euro Government Bond Fund - A (Ydis) EUR	EUR	€9.72	0.10% €0.01	3.07	4.72	-13.69	-5.65	08/01/1999	PDF

A Smart Fund Centre Journey

Contact

Login

OpenBank

Funds

Investment teams

Education

Knowledge hub

Speak to an Expert

Smart explorer

What would you like help exploring today?

Create fund summaryShow alternatives

Add this fund to my hypothetical portfolio

Of course, let me show you all the data and how this will fit into your hypothetical portfolio, please see the results below:

Ask smart explorer

Smart explorer can make mistakes. Check for accuracy.

Explore our funds

Innovative strategies from independent investment specialists, are available in vehicles such as separate accounts, U.S. 40 Act funds, UCITS, SICAV, private funds and other structures.

Our Managers

Your Strategy

Fund Name	Currency	NAV ¹	NAV Change ¹	Feb-24 / Feb-25	Feb-23 / Feb-24	Feb-22 / Feb-23	Feb-21 / Feb-22	Performance Inception Date	Fact Sheet
Disruptive Commerce Fund - A (acc) USD	USD	\$6.44	-3.01% \$-0.20	18.69	35.86	-25.66	—	15/10/2021	PDF
Diversified Balanced Fund - A (Ydis) EUR	EUR	€12.33	-0.72% €-0.09	9.19	8.40	-6.14	9.67	13/02/2006	PDF
Diversified Conservative Fund - A (Ydis) EUR	EUR	€9.99	-0.40% €-0.04	4.19	4.73	-11.67	-0.15	13/02/2006	PDF
Diversified Dynamic Fund - A (acc) EUR	EUR	€17.64	-0.90% €-0.16	12.32	11.36	-4.39	16.62	13/02/2006	PDF
ESG-Focused Balanced Fund - A (acc) EUR	EUR	€10.83	-0.64% €-0.07	11.15	14.79	-7.27	—	15/07/2021	PDF
Euro Government Bond Fund - A (Ydis) EUR	EUR	€9.72	0.10% €0.01	3.07	4.72	-13.69	-5.65	08/01/1999	PDF
Disruptive Commerce Fund - A (acc) USD	USD	\$6.44	-3.01% \$-0.20	18.69	35.86	-25.66	—	15/10/2021	PDF
Diversified Balanced Fund - A (Ydis) EUR	EUR	€12.33	-0.72% €-0.09	9.19	8.40	-6.14	9.67	13/02/2006	PDF
Diversified Conservative Fund - A (Ydis) EUR	EUR	€9.99	-0.40% €-0.04	4.19	4.73	-11.67	-0.15	13/02/2006	PDF
Diversified Dynamic Fund - A (acc) EUR	EUR	€17.64	-0.90% €-0.16	12.32	11.36	-4.39	16.62	13/02/2006	PDF
ESG-Focused Balanced Fund - A (acc) EUR	EUR	€10.83	-0.64% €-0.07	11.15	14.79	-7.27	—	15/07/2021	PDF
Euro Government Bond Fund - A (Ydis) EUR	EUR	€9.72	0.10% €0.01	3.07	4.72	-13.69	-5.65	08/01/1999	PDF

Real Time End User Content Orchestration

Our Knowledge Hub

We organize around areas for exploration to develop distinct insights and their practical applications for the benefit of our clients, now with the power of AI.

Explore insights ✨

View all ➤

Smart insights

Leveraging the power of Smart Insights, you're empowered to streamline your financial operations. Stay organized and focused on what truly matters for you and your clients.

✨
Create presentation
for client

✨
Download insights
for my newsletter

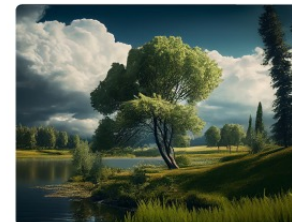
✨
Capture my notes

✨ RECOMMENDED INSIGHT

Quick Thoughts: The economic and market impact of AI

Can the AI economy and the markets adapt to the new reality and leverage the upcoming trends? Insights from our key members.

Read now ➡



ARTICLE

ESG Outlook: Sustainability as a business driver

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer aliquet augue sapien, tempus massa hendrerit non.



ARTICLE

Opportunities in commercial real estate debt

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer aliquet augue sapien, tempus massa hendrerit non.



ARTICLE

Uncovering retirement opportunities for advisors

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer aliquet augue sapien, tempus massa hendrerit non.


Give Advisors the intelligent tools they need

Welcome back to the
Advisor Portal, **John Jones**
Axis Intermediaries

Explore smart funds ✨

Preference Center

English ▾ | Contact Us | Welcome back, John ▾

OpenBank 

Investments ▾ | Portfolio Management ▾ | Insights ▾ | Tool & Resources ▾ | My hub

Q Search

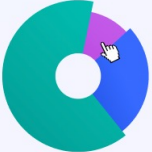
Smart funds

What would you like help exploring today?

Summarize the report

Of course, let me show you all the data and summary of this report, please see the results below:

Over the past five years, this portfolio has expanded through organic growth and strategic acquisitions in high-growth areas. Notably, the specialist investment managers acquired since 2019 now account for 64% of our total AUM. During this time, institutional AUM grew from 25% to 45%, creating a balanced mix between institutional and wealth management.





64% Stocks

26% Bonds

10% Alternatives

Our company brings together a wide range of investment managers to offer clients deep expertise across asset classes, investment styles, and geographies. We combine the advantages of global strength with the specialization of investment teams, each operating with investment autonomy and distinct philosophies.

Ask smart explorer



Smart funds can make mistakes. Check for accuracy.

can compare it against one of our active strategies.

Investment Calculators and Tools










Use these calculators to plan for retirement and college.

Fund Comparison

Our US Shareholder Mobile App
Available for Apple® and Android™ phones.

Analytics & Reports

Overview | Reports | Analytics | Files

Title	Smart actions	Download file
AI Tailored Report	Get insights Open smart explorer	
AI Tailored Report	Get insights Open smart explorer	
AI Tailored Report	Get insights Open smart explorer	
Standard report	Get insights Open smart explorer	
Standard report	Get insights Open smart explorer	
Standard report	Get insights Open smart explorer	
Standard report	Get insights Open smart explorer	
Standard report	Get insights Open smart explorer	
Standard report	Get insights Open smart explorer	

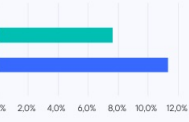
AI Powered Analytics Insights

64% Stocks

26% Bonds

10% Alternatives

Potential returns
18 year horizon



See all investments

Most popular

See all funds

Asset Class

Fixed Income

Fixed Income

Fixed Income

Fixed Income



Fixed Income

Fixed Income

Smart funds

Your funds, your experience.
Now truly personalised for
your clients outcomes.

Stay organized and focused on what truly matters for you
and your clients.

Tell us what are you looking for... 

or use smart suggestions

Access information from client portfolio

Create hypothetical funds scenario

Create investments summary for client

Add more tools +

See all resources

Use smart funds tool ✨

Give Advisors the intelligent tools they need

English

Contact Us

Welcome back, [John](#)

OpenBank

Search

Investments

Portfolio Management

Insights

Tool & Resources

My hub

Smart insights

Hello, John

How can I help you with the report?

Suggested

- Would you like me to send you a PDF of this report?
- Can I summarise this report for you?
- Do you need a presentation from this report?

Ask

- Product help
- Navigate the platform

Ask smart insights

Smart explorer can make mistakes. Check for accuracy.

Our Clients Portfolio Report

Over the past five years, this portfolio has expanded through organic growth and strategic acquisitions in high-growth areas. Notably, the specialist investment managers acquired since 2019 now account for 64% of our total AUM. During this time, institutional AUM grew from 25% to 45%, creating a balanced mix between institutional and wealth management.

64% Stocks

26% Bonds

10% Alternatives

Unlimited Possibilities, One Vision

Annual Report 2025

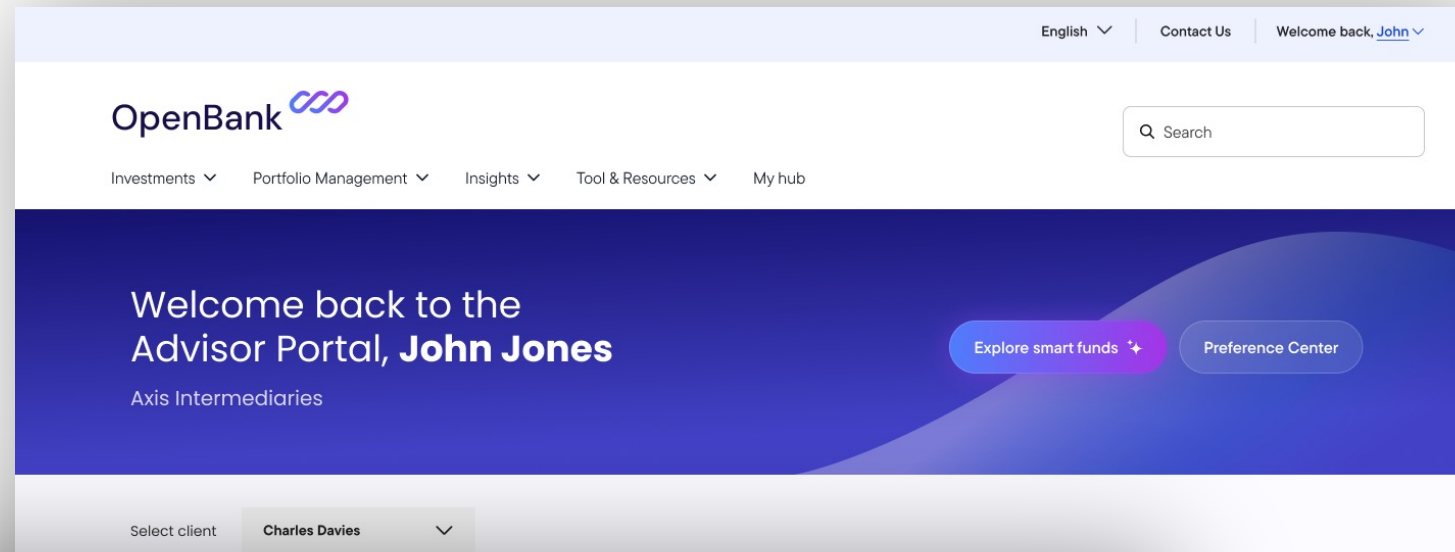
Our company brings together a wide range of investment managers to offer clients deep expertise across asset classes, investment styles, and geographies. We combine the advantages of global strength with the specialization of investment teams, each operating with investment autonomy and distinct philosophies.

REPORT ARTICLE

ESG Outlook: Sustainability as a business driver

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ac vestibulum leo, vitae egestas ligula. Sed arcu justo, pulvinar quis odio ac, venenatis sollicitudin massa. Phasellus quis lacus eget diam condimentum semper.

Give Advisors the intelligent tools they need



AI Suggestions

Show updates recap from **client portfolio**
Get the most recent data

Create **hypothetical investment** scenario
Step by step AI-powered process

Create **investments summary** for a client
Summarise smart data with AI

Charles Portfolio

Preferences

See all investments

All funds

Favorite funds

Top rated

Most popular

See your client detailed portfolio.

See all funds

Fav	Fund name	Factsheet	Asset Class
<input type="checkbox"/>	Example fund name		Fixed Income
<input checked="" type="checkbox"/>	Example fund name		Fixed Income
<input type="checkbox"/>	Example fund name		Fixed Income
<input type="checkbox"/>	Example fund name		Fixed Income

Tools & Resources

Fund Comparison

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ac vestibulum leo, vitae egestas ligula. Arcu justo, pulvinar quis odio ac, venenatis sem massa.

Investment Calculators

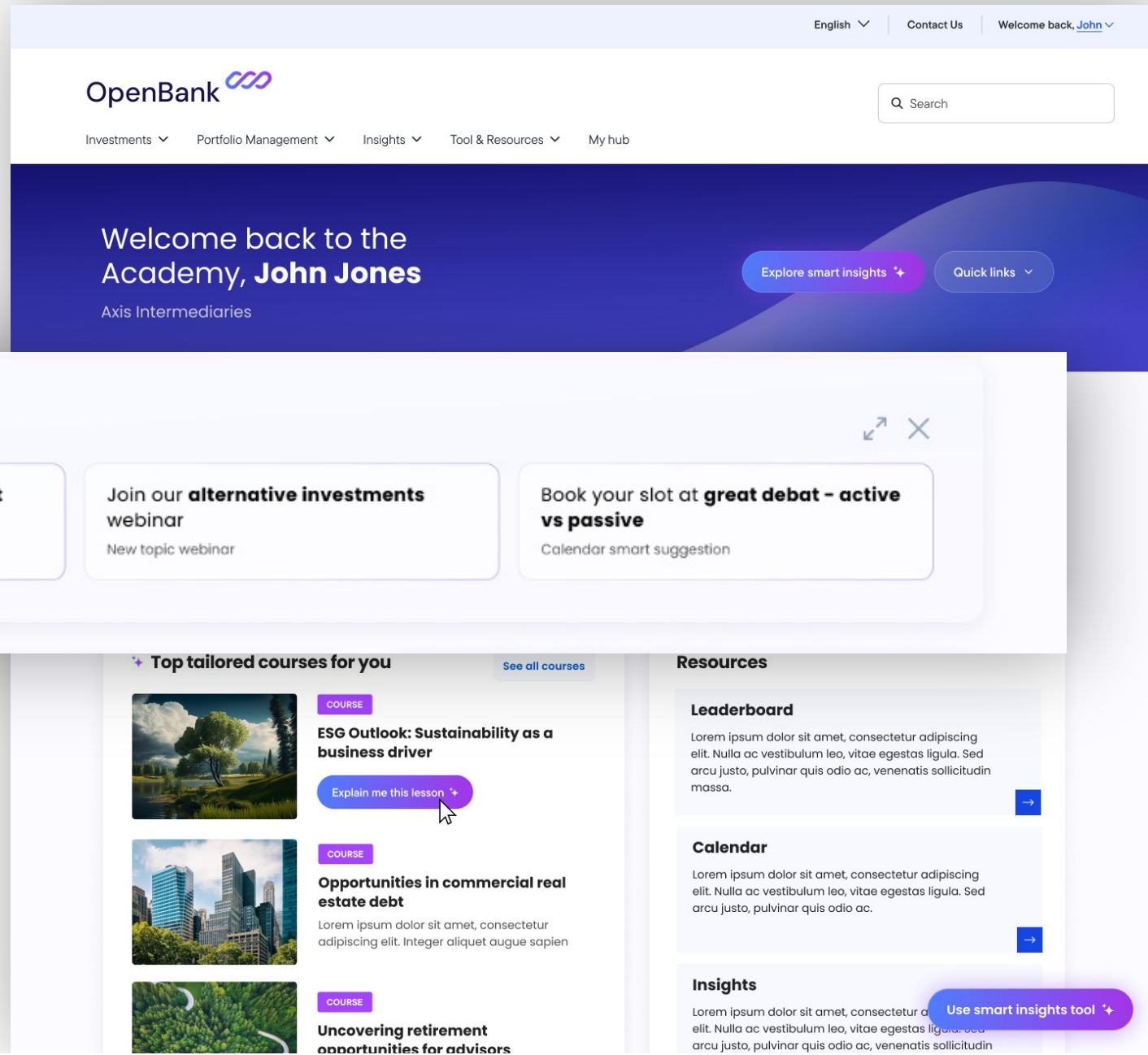
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ac vestibulum leo, vitae egestas ligula. Arcu justo, pulvinar quis odio ac.

Fund Comparison

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ac vestibulum leo, vitae egestas ligula. Arcu justo, pulvinar quis odio ac, venenatis sem massa.

Use smart funds tool

Create better product education, bespoke to the user



1

You are now moving into an era of **two-way dialogue within your website experience** – what conversation do you want to have / start?

2

The design language within your design systems most likely **needs to evolve** to cater for the change in the types of interfaces

3

Guardrails need to be put in place to make sure the hybrid UX achieves the goals you want it to for the business and the end users.

Actionable takeaways

4

It's time to **re-evaluate your user journeys and website functionality** to ensure its future proofed over time – Set achievable priorities

5

We need to **bring compliance along for the journey** to ensure we navigate the new tools and experiences to maintain compliant position.

6

Its naturally going to **change the way users interact with your content** through SEO in LLMs and voice-search, but humans want to interact with brands and understand their proposition.



Steve Dale

UX & Digital Experience Director

Questions

Q&A:

Panel Discussion:

What's next for Digital Experience in Asset Management?



Anji Kang-Stewart

Managing Director Global Head of Marketing, Man Group



John Hennessey

Senior Partner, Alpha FMC



Tom Hughes

Head of Marketing, Gemcorp Capital

Q&A:



Anji Kang-Stewart
Managing Director Global Head of
Marketing, Man Group

Panel Discussion:

1. How is your firm balancing the use of digital tools versa personal client relationships?
2. How are you using AI to personalise client experiences, and what challenges have you faced?
3. What shifts in client expectations have you noticed, and how are you adapting?
4. What's been your biggest hurdle in keeping digital engagement secure and compliant?
5. What's one technology or trend you're excited about that will shape client engagement in the next 18 months?

Thank you for
joining us today!

Webinar on
25 March 16:00 GMT

The **Evolution** of **Digital Experiences** in **Asset & Wealth** **Management**

Sponsors:

SITEBOX™

KURTOSYS

 **Alpha**



Today's Host: Paul Fawcett
Co-Founder @ SiteBox