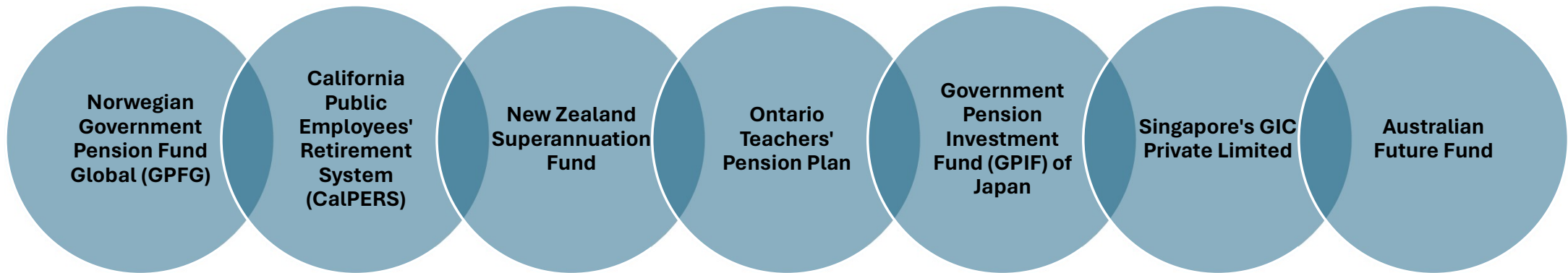


New Technology & Portfolio Construction

Jason Petras

Resonant Asset Management

Institutional frameworks



Process



- Total Portfolio
- Asset Allocation
- Risk Management

Governance



- Robust IC
- Transparency

Scale



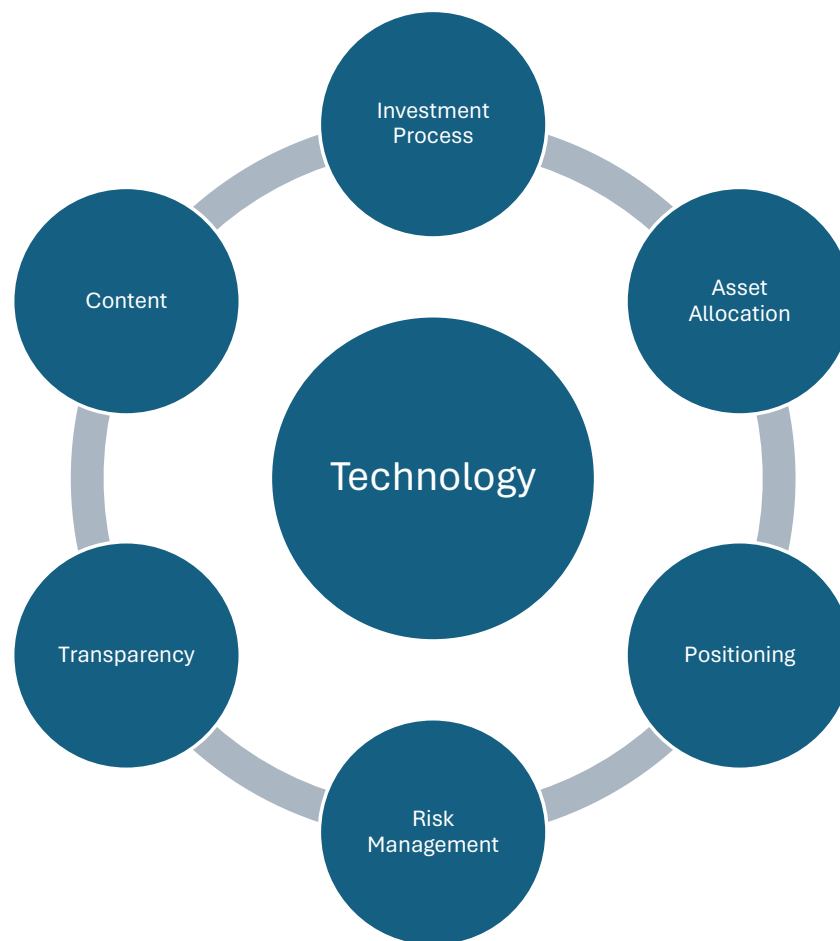
- Investments
- Pricing power
- Internal teams

Independence



- True autonomy
- Professional teams
- Accountability

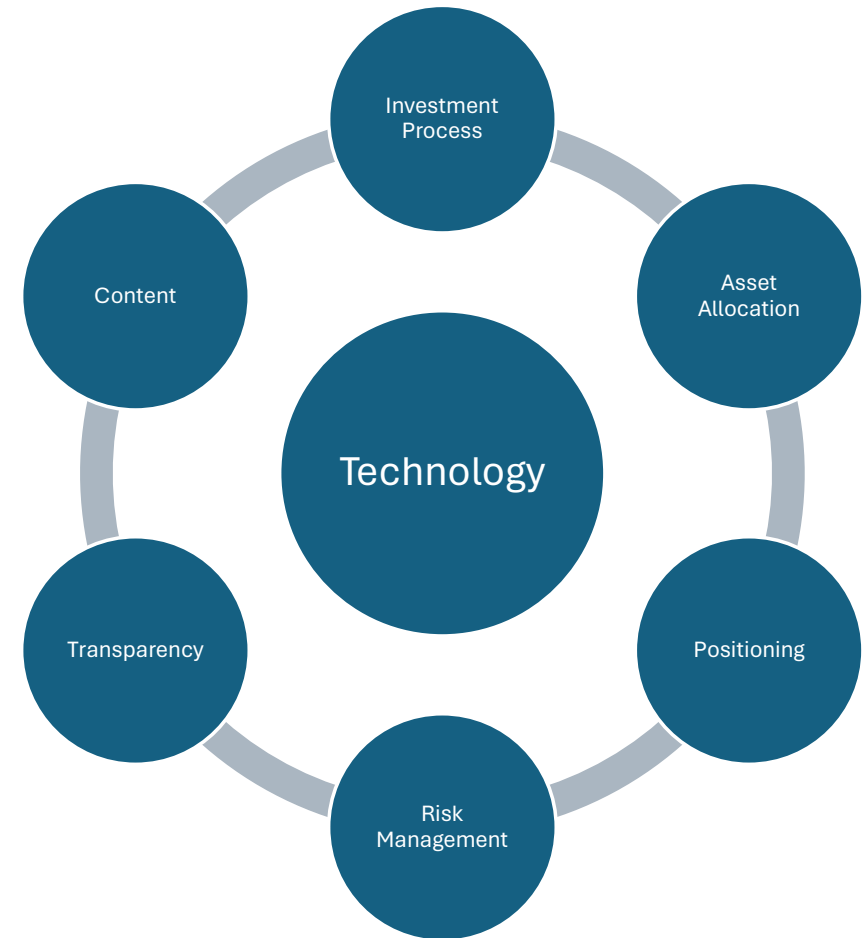
Technology is the glue



Informed decisions with justification



Investment Committee
&
Governance



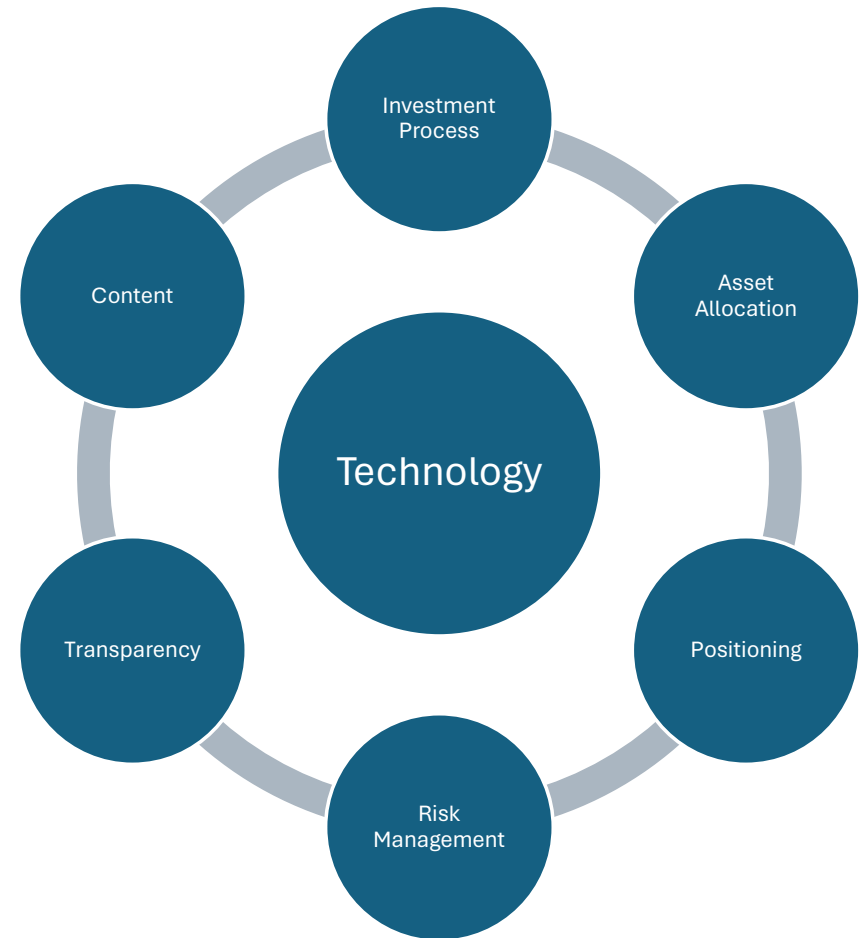
.....to portfolios and outcomes



Investment Committee
&
Governance



Advisers



...and into discussions



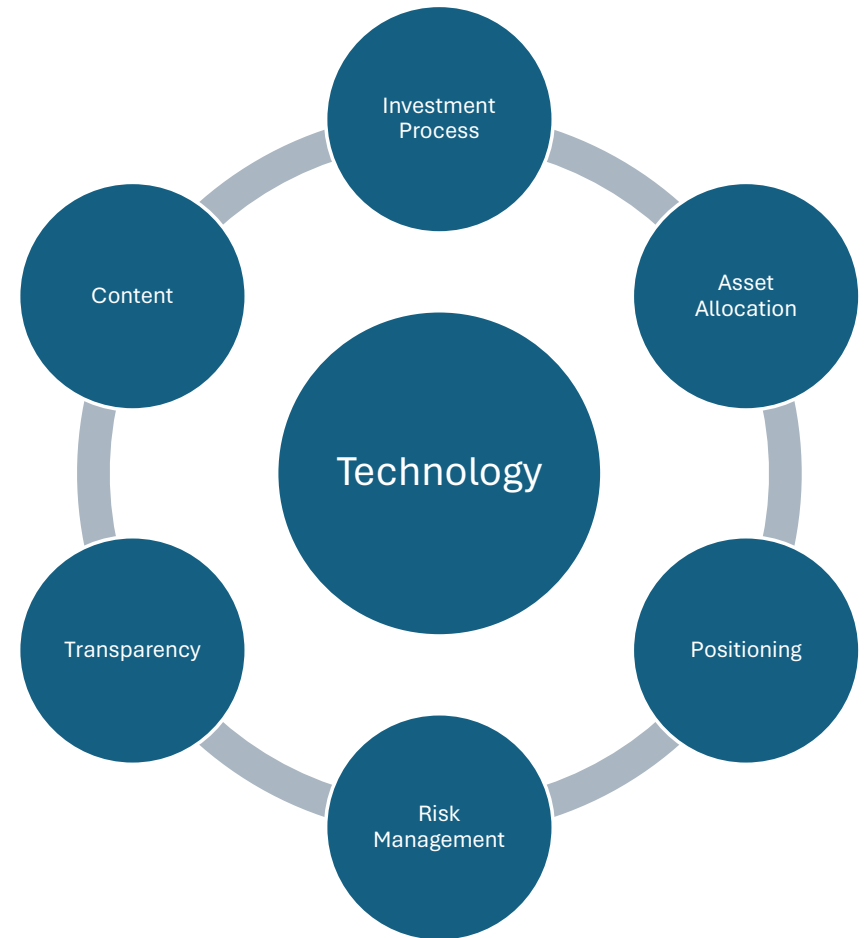
Investment Committee
&
Governance



Advisers



Clients



Trends

Legacy

- Static AA
- Return without risk
- Portfolio Inconsistency
- Message Contradictions

Enablers

- Cloud infrastructure
- Platforms
- Open source
- Datasets
- Automation
- AI
- Delivery mechanisms

Future State

- Dynamic AA
- Factor investing
- Traceability & Transparency
- Customisation
- Consistency