MOODY'S ANALYTICS | PFaroe™

Gain a Holistic View of Risk with PFaroe™ Wealth

In the ever-evolving wealth and Defined Contribution pensions market, managing the relationship between investment strategy, market risk and customer outcomes is key.

Trusted by some of the UK's largest asset managers, advisers and wealth managers, PFaroe Wealth delivers powerful portfolio analytics and risk management capabilities that enable you to develop robust, risk-focused portfolio design and monitoring exercises to support your investment proposition.

The offering comprises two core elements:

Analytics

An analytics user interface that supports the design, investment governance and risk monitoring of fund solutions targeted at retail and Defined Contribution pension investors

Forecaster

A forecasting engine that can be integrated into your digital ecosystem – driving engagement and retention by demonstrating likely investor outcomes.

Gain efficiencies and reduce operational risk

Built with the end user's needs in mind, PFaroe Wealth automates time-consuming tasks and delivers a consolidated solution that helps you address key business requirements.

Analyze

Compare portfolio risk and return across a wide range of different risk and outcome metrics

Design

Develop optimized investment solutions aligned to customers' financial objectives and risk profiles

Forecast

Access powerful economic scenario models to forecast potential investor outcomes, providing a forward-looking view on portfolio risk

Monitor

Stress test the effectiveness of risk management strategies. Efficiently monitor, track and report on risk across your investment proposition

Engage

Create insightful and engaging content to support discussions and interactions with key stakeholders and clients

Deliver valuable insights

Compare DC scheme defaults and lifestyle glidepaths	Monitor DC scheme outcomes across member cohorts	Complete Value-for-Money analysis	Build efficient frontier models	Stress test strategic asset allocation decisions	Analyze the impact of tactical asset allocation choices

How can PFaroe Wealth help your business?

	ADVISERS	WEALTH PRODUCT PROVIDERS	DC PENSION SCHEME MANAGERS
Monitor solution effectiveness	✓	✓	✓
More efficient client/member reporting	✓	✓	✓
Scale your risk reporting operations	✓	✓	✓
Improve risk management	✓	✓	✓
Create tailored reporting	✓	✓	✓
Eliminate obsolete systems	✓	✓	✓
Design suitable solutions	✓	✓	✓
Demonstrate best practice processes	✓	✓	✓
Create more insightful stakeholder communications	✓	✓	✓
Reduce errors/eliminate manual processes	✓	✓	✓
Reduce key person risk	✓	✓	✓
Bolster modelling credibility	✓	✓	✓
Demonstrate objectivity	✓	✓	✓

CONTACT US

To learn more, visit: pfaroe.moodysanalytics.com and complete the contact us form.