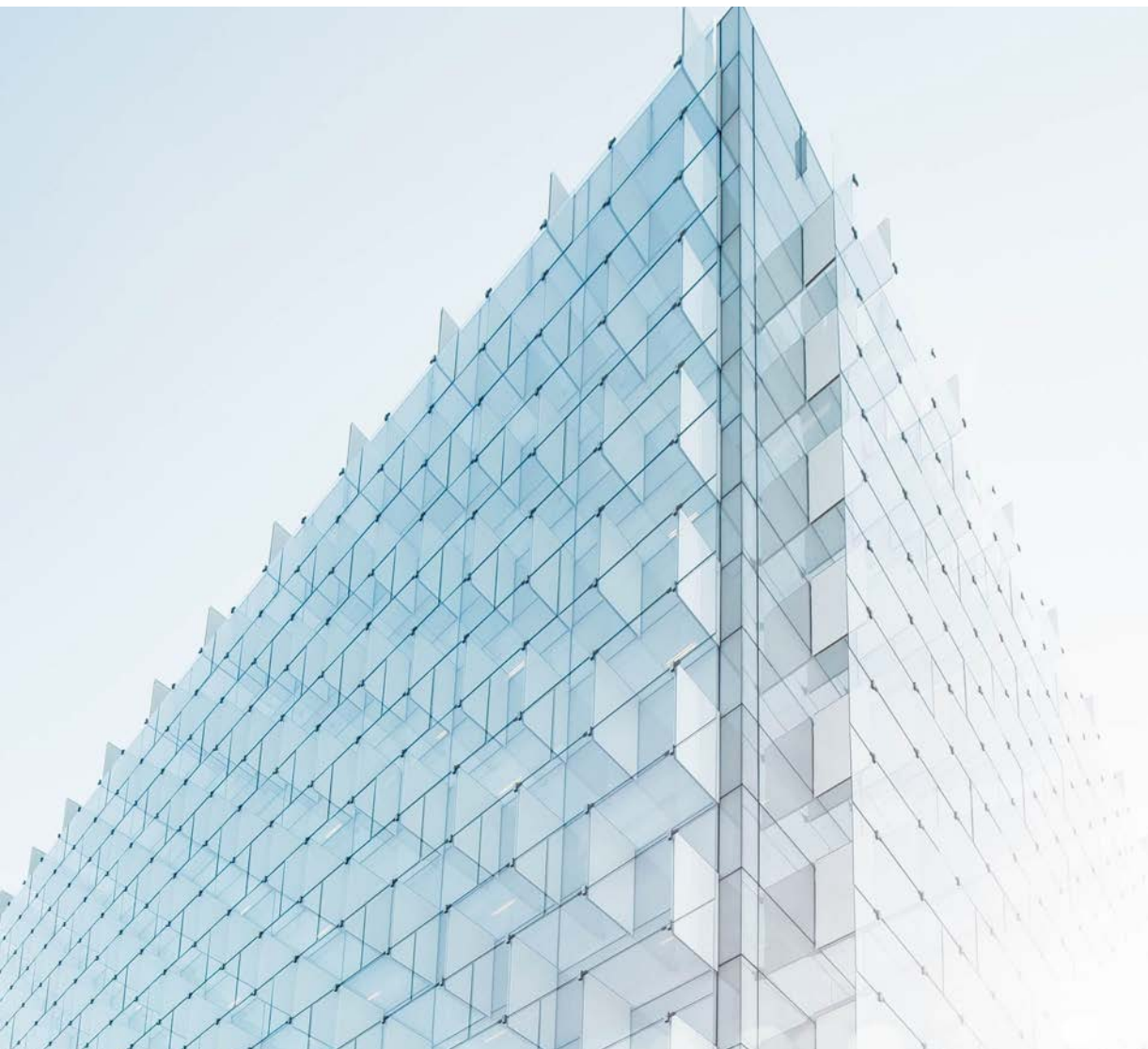




INVEST BETTER

Introductory Deck



MAKE SENSE OF YOUR WEALTH



ALL ASSETS



ALL ELECTRONIC FORMATS

Canopy is an anonymous wealth data aggregation and insights platform that empowers high net worth individuals to make better investment decisions.

BENEFITS



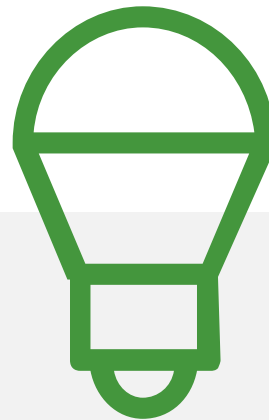
TIME SAVINGS

Say goodbye to manual entry.
Simply upload your statements to
have all your data consolidated.



COST SAVINGS

Enjoy lower operational cost when
less resources are required to
produce more output.



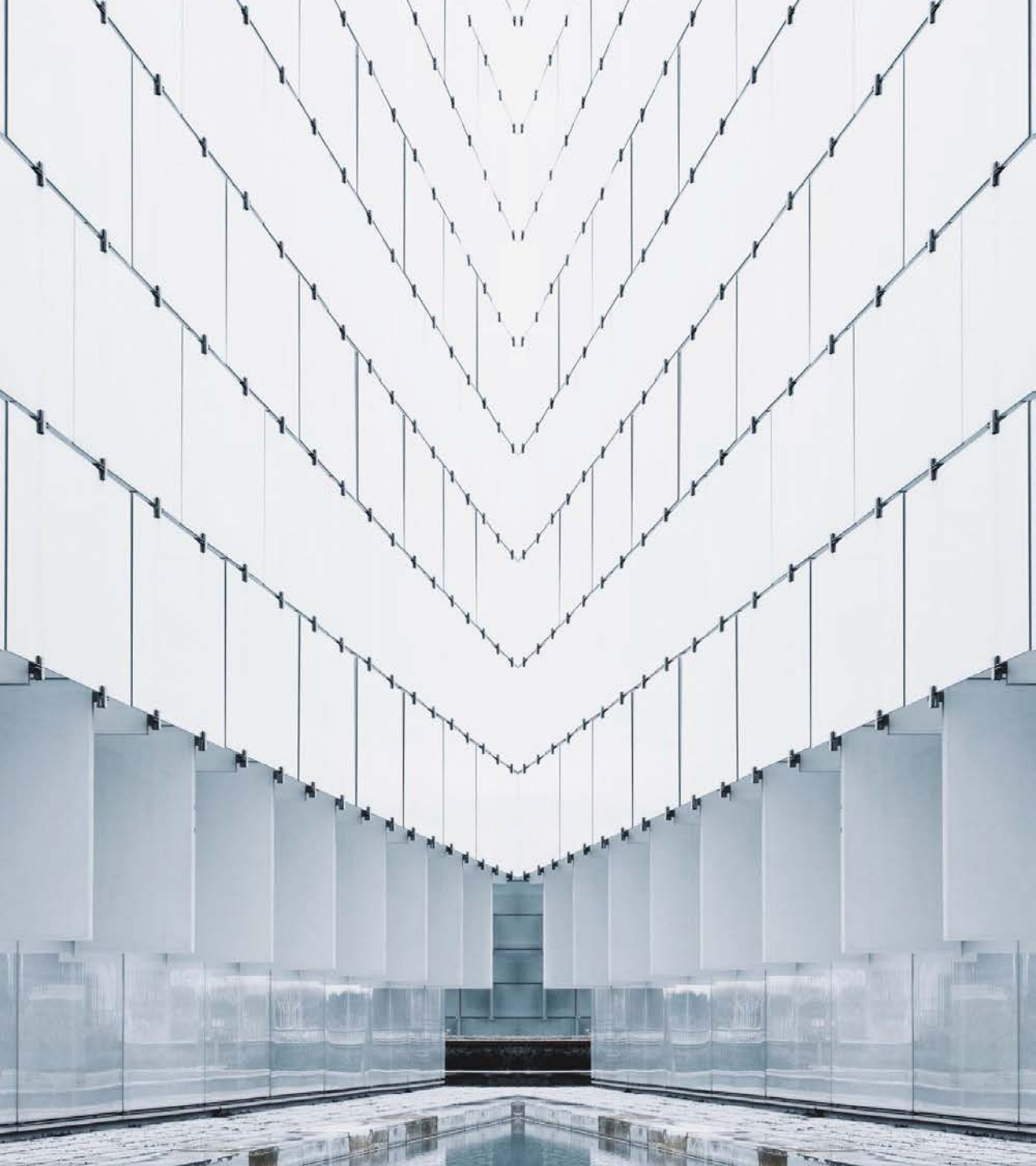
CUSTOMIZABLE

One size never fits all. We
customize professional reports
according to your requirements.



DATA ACCURACY

Reconciliation is performed using a
“triangulating” methodology to ensure
data accuracy.



SECURITY

OUR PRIORITY



Canopy meets international information security standards and is ISO 27001 certified.

Hosted in secure AWS cloud, we are protected with bank-level security including SHA-256 SSL and 2048 bit encryption.

KEY DATAFEED PARTNERS

CUSTODIANS WORLDWIDE

Credit Suisse (CS), Bank of Singapore (BOS), JP Morgan (JPM) and Interactive Brokers (IB) data feed is available for free for CS and BOS clients under the Canopy Lite program.



ANONYMOUS PLATFORM



VISUALIZER



REPORTER

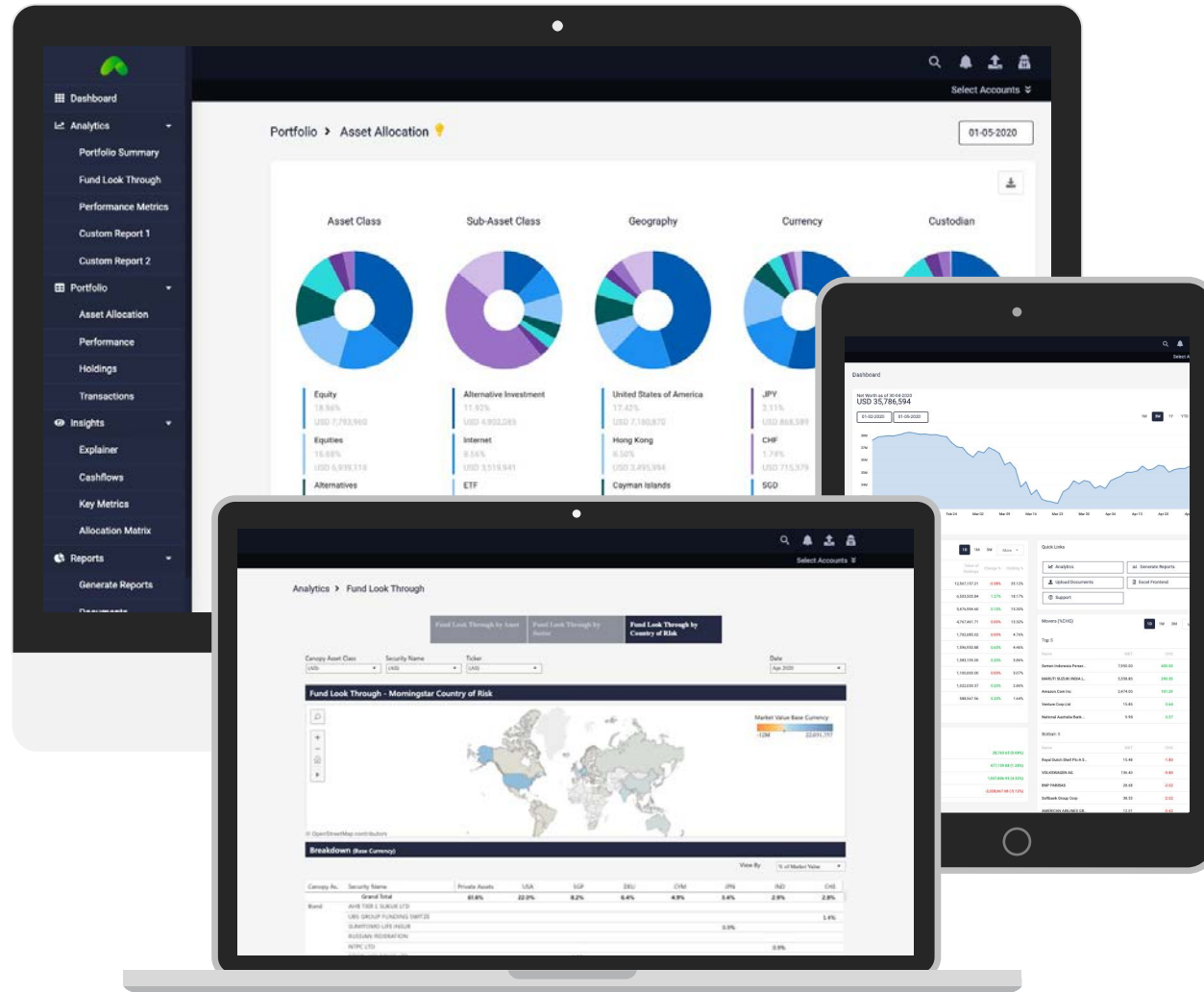


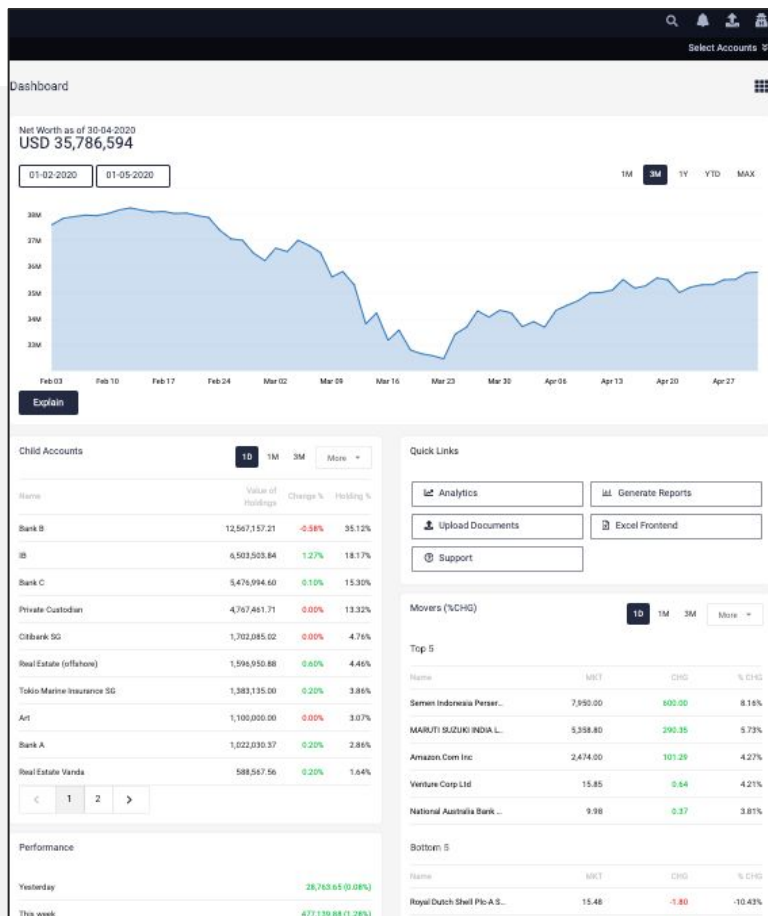
ANALYTICS



EXTRACT

In-depth analyses, customized reports and instant PDF extraction all in one solution. Best of all, the platform is completely anonymous to protect your identity.

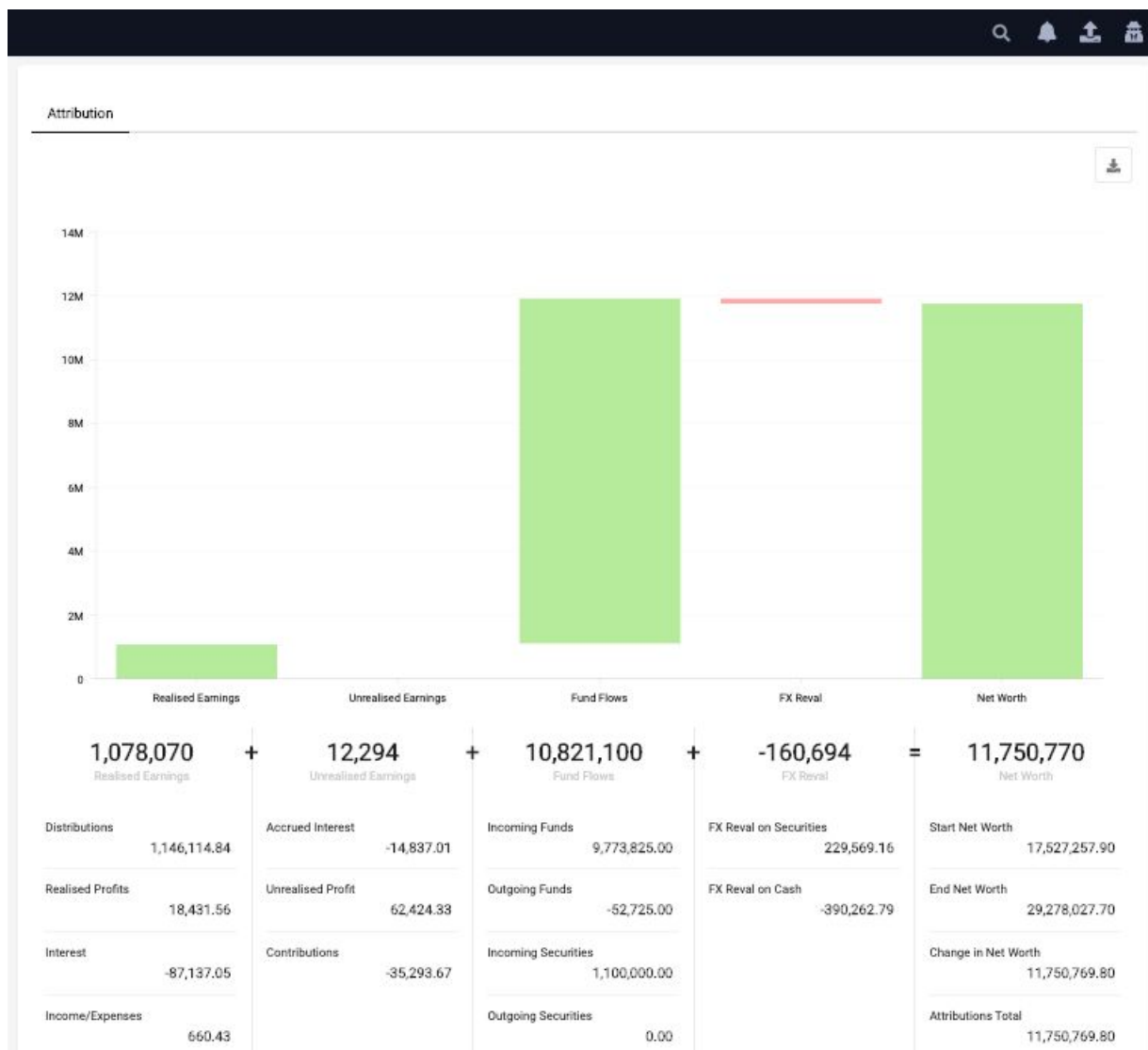




FEATURES

VISUALIZER OVERVIEW

Short overview of key features in Canopy.
Option to whitelabel is available upon request.

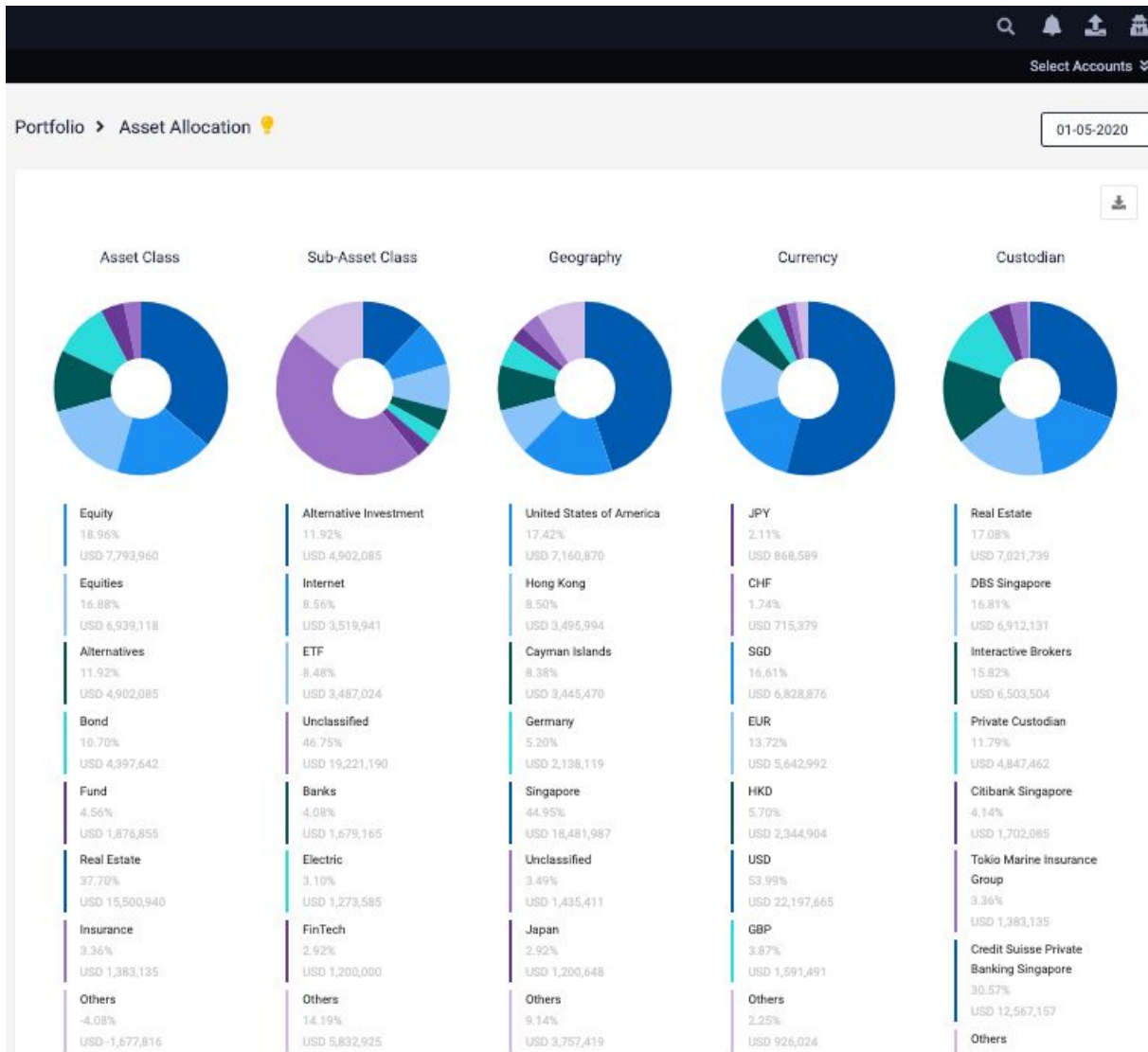


EXPLAINER

PERFORMANCE ATTRIBUTION

The Explainer explains where money was made (or lost) between any two dates. The change in net worth is categorized into realized earnings, unrealized earnings, fund flow, and FX revaluations.

Within each category, you can further drill down to see the individual factors, and rank individual securities according to their contribution.

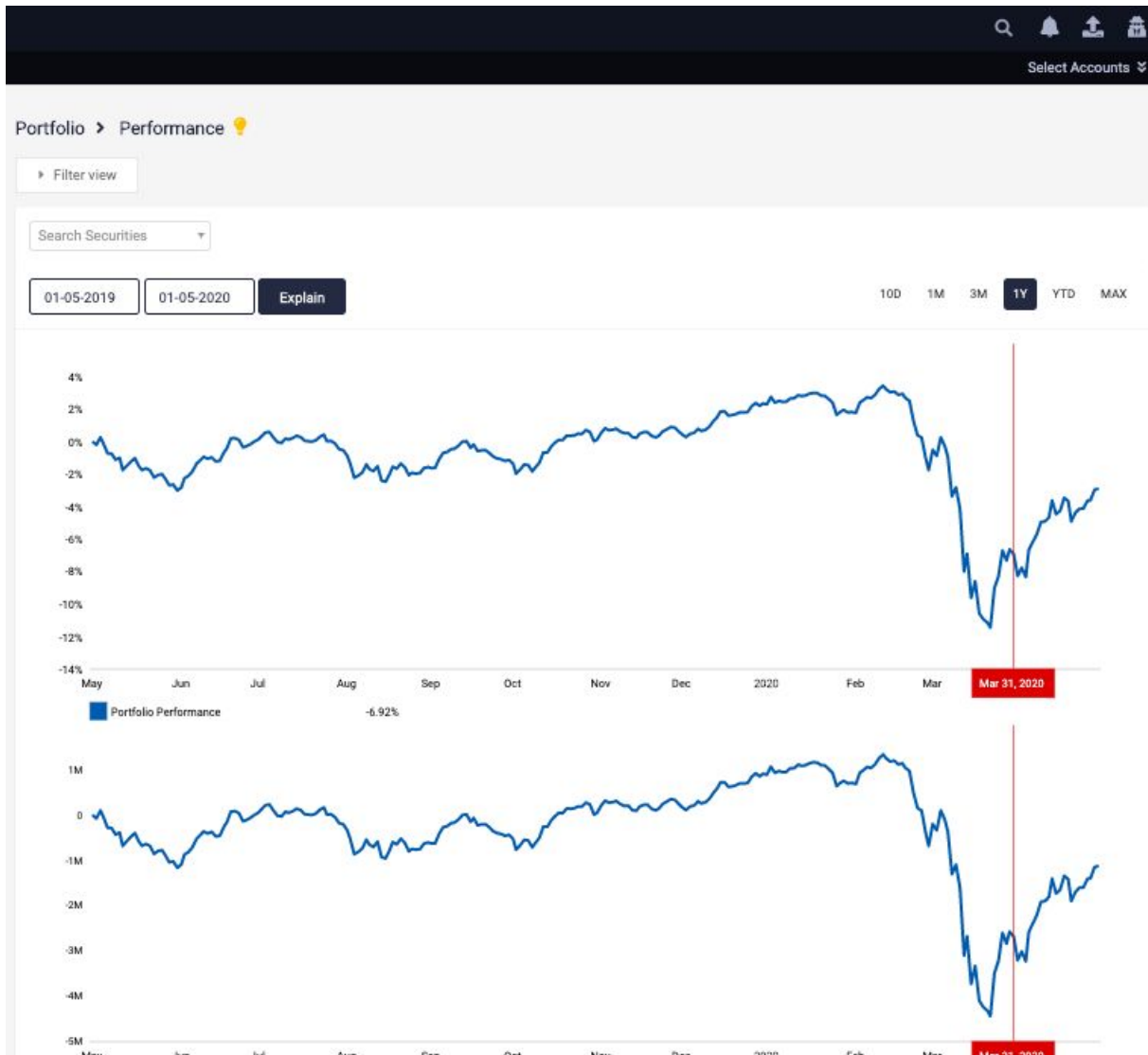


ALLOCATION

ASSET ALLOCATION

The Allocation page shows the asset allocation by five categories: Asset Class, Geography, Industry, Custodian, and Currency.

Click through any of the pie chart elements to drill down to the individual security level in each sub-category.

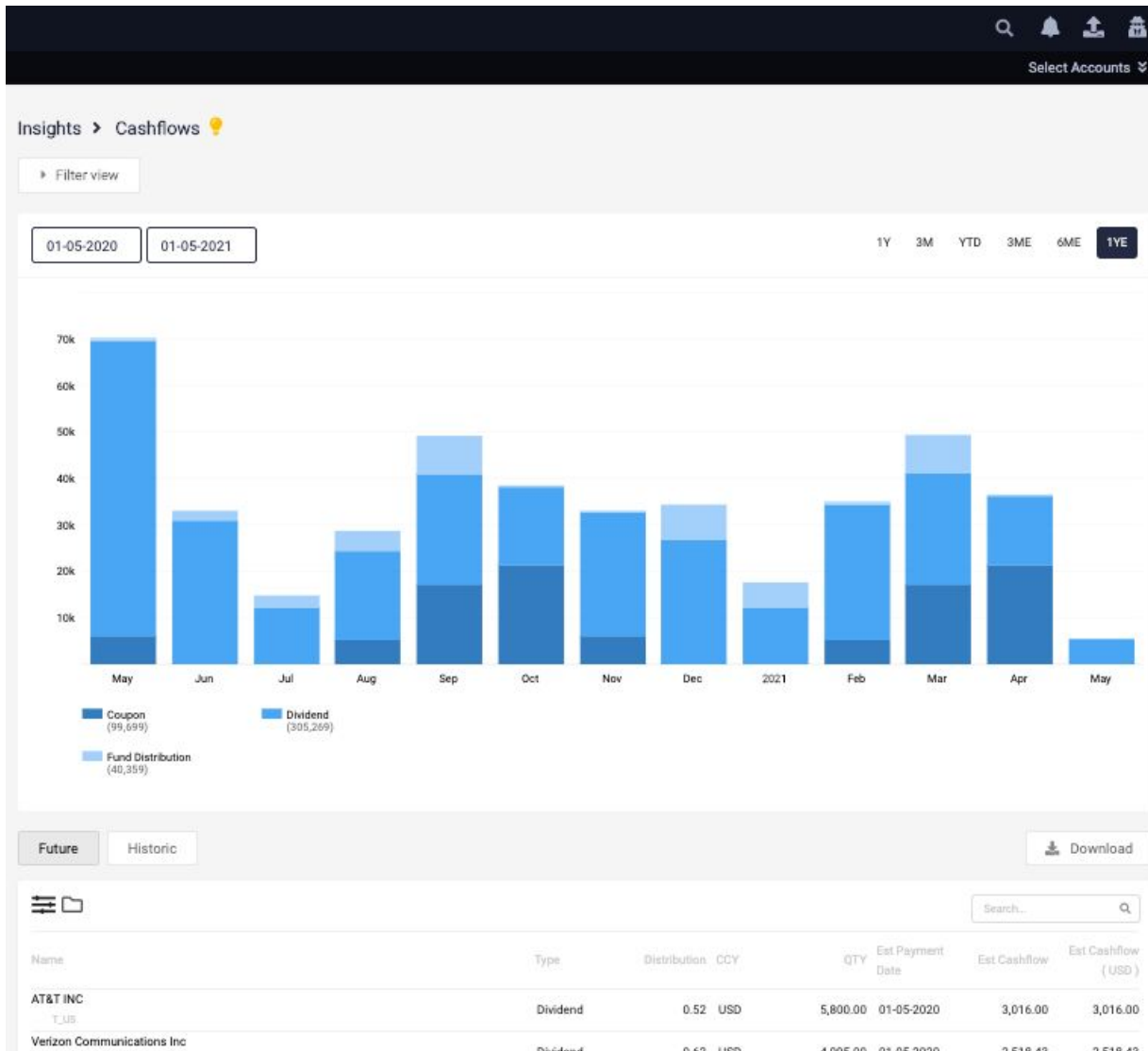


PERFORMANCE

TRACKING AND COMPARISON

The Performance page shows the aggregated portfolio NAV and profit line.

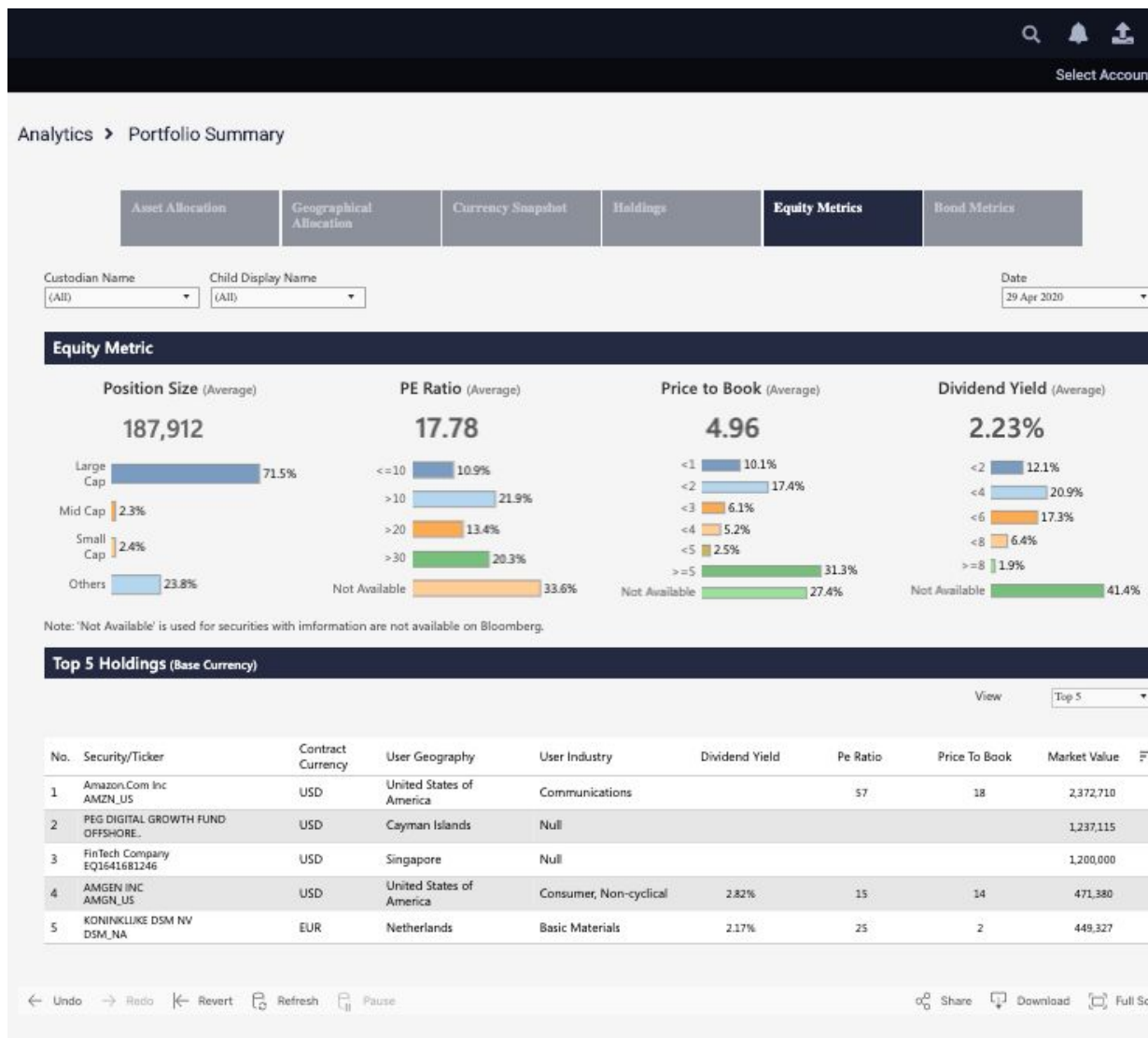
Compare portfolio performance against benchmarks or between individual accounts.



CASHFLOWS

PROJECTED AND HISTORICAL

The Cashflows report is a pro-forma historical record and projection of the cashflows from coupons and dividends based on the current bond and equity holdings.

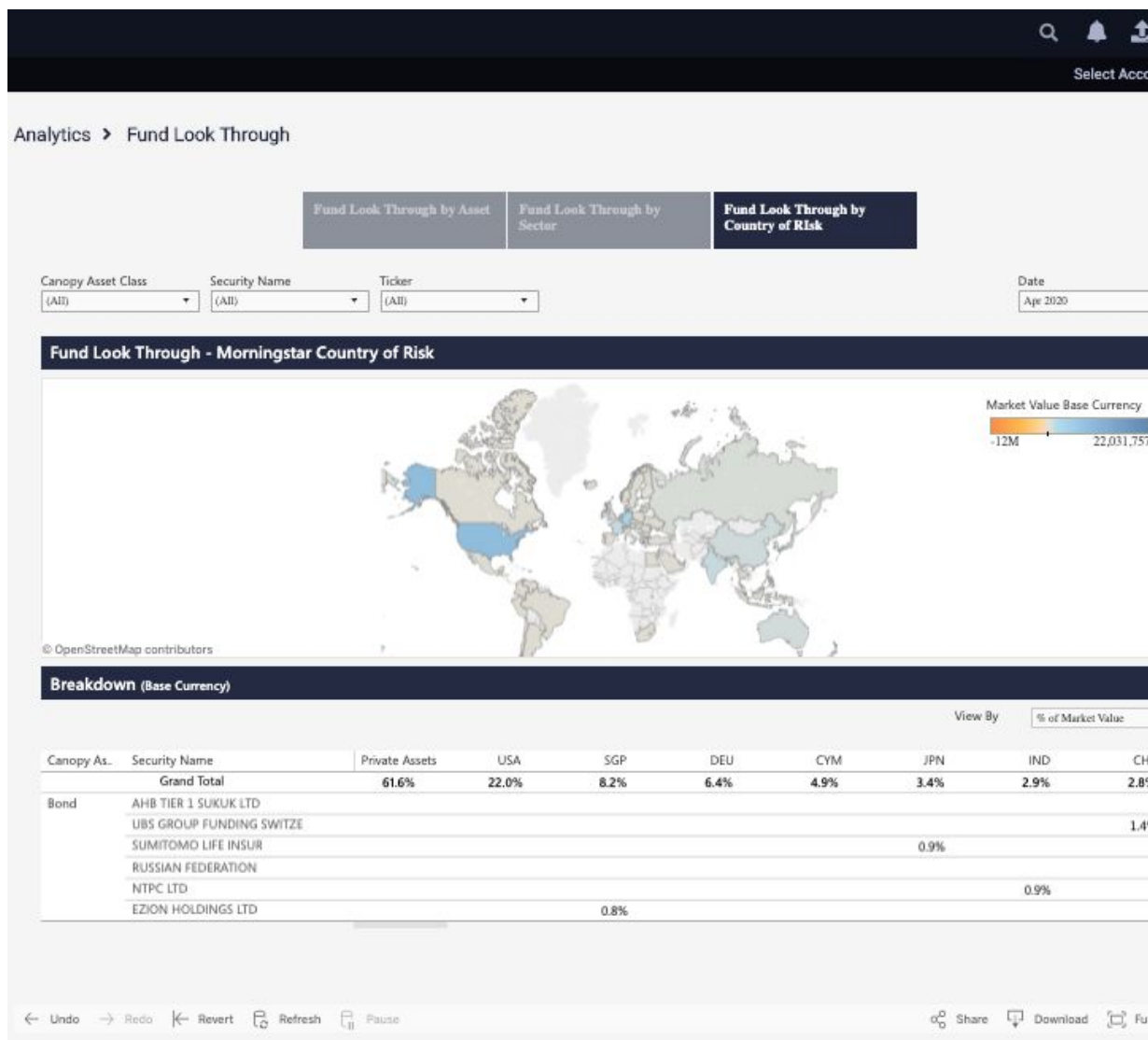


ANALYTICS

INTERACTIVE DASHBOARDS

Canopy dashboards provide clients with customized, deep and rich analytics for every client to view data in their own way.

A new dashboard can be created within minutes and is configurable at individual client level.



FUND LOOK THROUGH

UNDERSTAND TRUE EXPOSURE

Canopy offers Fund Look Through by asset class, sector and country of risk. Data obtained from Morningstar is updated regularly to help your understand your true exposure.



Image for illustration only

REPORTS

INSTANT GENERATION

Canopy dashboards provide clients with customized, deep and rich analytics for every client to view data in their own way.

A new dashboard can be created within minutes and is configurable at individual client level.

PRESS AND AWARDS

NEWS

Covid-19 forces banks to reconsider their crisis plans



By CNNMoney Switzerland
Posted on June 17, 2020



Tanmai Sharma
Founder and CEO, Canopy

The coronavirus crisis has spurred demand for business continuity plans to cope with the new environment, accelerating the digital transformation of industries including finance. Banks will be required to interact with their mobile phones in the future, says Tanmai Sharma, co-founder and CEO of Canopy in Singapore and Zug. The company provides data analysis tools to help private banks.



Singapore fintechs, financial institutions tap govt support to digitally pivot, keep hiring

WED, JUN 10, 2020 - 3:00 PM

KELLY NG ✉ kellyng@sph.com.sg 🐦 @KellyNgBT

SOME 167 fintech firms and financial institutions have signed up for digitalisation grants, two months after the government rolled out a S\$125 million support package for the industry.

One of these Industry Pilot projects involve five financial institutions working with Canopy, a data aggregation and visualisation platform, to collect data from multiple custodian banks in a comprehensive and consistent format.

With this partnership, institutions can redirect employees previously in charge of manual handling of data to take on more value-added tasks, such as data analysis and customer service.

"The current challenge is that banks deliver the information to external asset managers in different formats. As with all complex datasets, there are challenges to make the data complete and consistent. The industry pilot will focus on improving the data quality and processing speed so that the external asset managers can focus more time on managing the client investments instead of processing data," said Canopy founder Tanmai Sharma.

THE BUSINESS TIMES



PRESS AND AWARDS

BEST DATA ANALYTICS

Canopy was awarded the **Best Data Analytics Solution** by Asian Private Banker in 2019 and 2020.



BEST DATA
ANALYTICS
SOLUTION
2019 | 2020



SPEAK TO US

hello@canopy.cloud

CANOPY PTE. LTD.

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