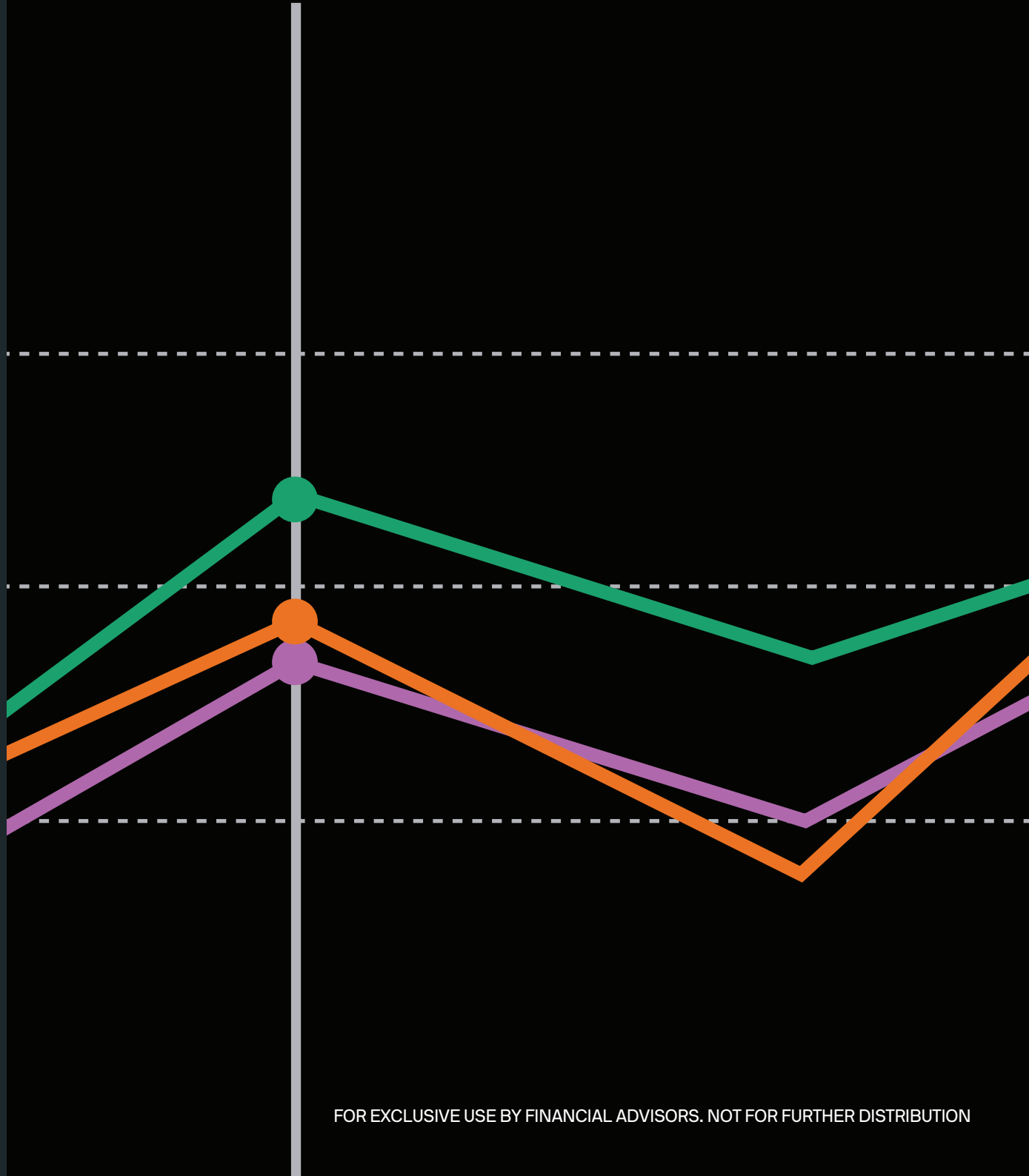


# Introducing J.P. Morgan Asset Management's Digital Portfolio Insights (DPI)

*Smarter Insights.  
Better Outcomes.*





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on course through  
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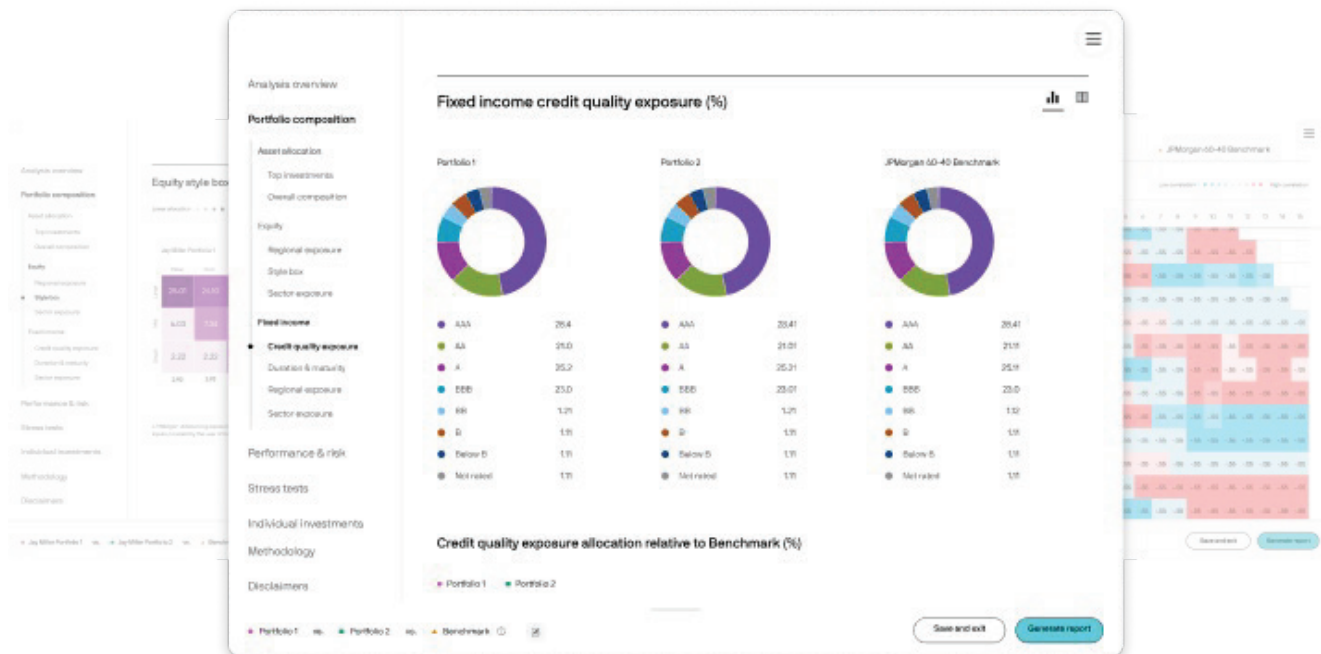
Accessing DPI

## Keep portfolios on course through fast-moving markets

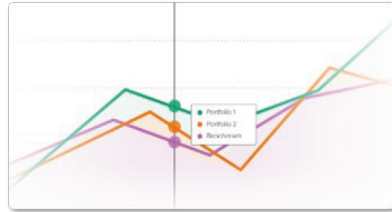
*Get instant portfolio analytics, side-by-side comparisons, historic stress tests, future scenarios, observations and client reports – all at no cost.*

**DPI** is a digital tool within our Adviser Portal that allows financial advisors to build portfolios and run analytics instantly and at no cost. The tool leverages Morningstar data to analyse a portfolio's performance and exposures, compare it to a suggested portfolio and/or benchmark, and provide observations and insights into what's driving risk and returns. It's customisable, enabling advisors to tailor client reports and share investment ideas.

DPI aims to enhance an adviser's value by providing actionable insights. **The tool is currently available to advisers across U.S. and select markets in APAC.**



## Key Features



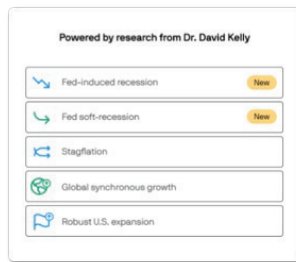
### Portfolio analytics designed with your clients' needs in mind

*Get an unbiased evaluation to confirm or rethink portfolio positioning*

Compare multiple portfolios at the same time and assess the impact of changes before making them.

Understand what's driving your portfolio's risk/return.

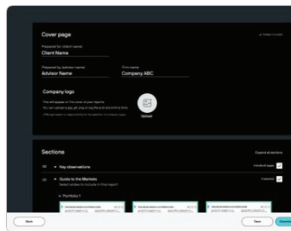
Assess your portfolios from different angles and view your exposures across different drivers.



### Stress test portfolios and assess future scenarios

*Invest with more certainty in uncertain times*

Run your portfolios through our online analytics to instantly stress test and compare performance under different equity markets, rate environments or forward-looking scenarios based on J.P. Morgan Asset Management's in-house research.



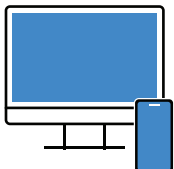
### Create customised client ready reports

*Choosing the content that is important to you and your clients*

With the flexibility to customise your reports and adding your company logo, you have the ability to create a report that is uniquely yours for your client meeting.

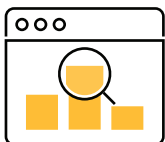


## Why should I use DPI?



### Flexible

- ✓ DPI can be accessed in two ways: Via the Adviser Portal on our website or through our Insights app (iPhone and iPad)



### Actionable

- ✓ Run instant, on-demand analytics 24/7 at no cost
- ✓ Intuitive to use, easy to navigate



### Customisable

- ✓ Unbiased evaluation to confirm or rethink portfolio positioning
- ✓ Leverage our insights and make them your own
- ✓ Access a database of 8,000+ Australian investments
- ✓ Turn "what if" into "what to do" with action-oriented stress tests
- ✓ Create customised reports for each client

## Accessing DPI

Scan the QR code to register:



Download the Insights app from the Apple store and then register



Contact your J.P. Morgan representative and let us help you navigate the tool



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Provided for information purposes only to illustrate features of the tool, not to be construed as offer, research or investment advice.

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