

BEHAVIOURAL FINANCE

MiFID II suitability test with a focus on behavioural finance and gamification



Suitability assessment: It assess your clients' MiFID II profiles through gamification and behavioural finance.



Assessment of sustainability preferences: It assess your clients' sustainability preferences through gamification and behavioural finance.

Functions of the solution



GUARANTEES MiFID II COMPLIANCE

The solution has been audited by PwC and validated by the major European regulators.



GAMIFICATION

It offers a gamified survey that can be customised based on the type of client – from new generations to senior clients with great purchasing power.



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This function is based on behavioural models that have been awarded two Nobel prizes. They yield a predictability rate of 94% for the client's profile.



MULTI-DEVICE

Available for smartphones, tablets and desktop computers. The client can take the survey remotely with the intervention of an advisor.

Advantages for business

- 1** Since the rate of predictability for client risk appetite is high at 94%, it is possible to **increase investment proposal conversion by 10–40%** as more suitable products are recommended.
- 2** A **20% increase in client loyalty** thanks to a more precise short- and long-term financial recommendation.
- 3** Thanks to the gamification and user experience techniques implemented in the surveys, their completion rate rises, and with it **there is a 10% increase in client acquisition**.
- 4** A **reduction of two hours invested** is estimated per client and advisor each year thanks to the practicality of the surveys and the ability to complete them remotely, which represents **EUR 77 in savings per year** for each client.
- 5** The surveys meet the regulatory requirements under MiFID II and they are also audited by the European regulators and prestigious consultants. This means **EUR 17 saved per client per year in regulatory compliance costs**.

Our solution

Una acción es...
Seleccione la respuesta correcta.

A	Una inversión garantizada	B	Un préstamo a una empresa
C	Una parte de una empresa de capital	D	No sé

Debe extraer una bola al azar de una de estas dos urnas.
La urna de la derecha contiene 1 sola bola **roja** con la que perderá 20 €.
La urna de la izquierda contiene 2 bolas:
- 1 bola **roja** con la que perderá 60 €.
- 1 bola **verde** con la que ganará 90 €.

Haga clic en la urna de la que desea extraer.



Mostrar la media

Tiene 5 fichas para repartir entre tres empresas con perspectivas de ganancias similares

Asigne sus fichas al proyecto o proyectos en los que desea invertir

5 / 5

Empresa con un objetivo medioambiental



Empresa con un objetivo social



Empresa sin objetivo medioambiental o social específico

