

Diversifikator

Subject

Diversifikator GmbH offers transparent portfolios for „skeptical“ advisors and investors. Founded in 2016 by Prof. Dr. Dirk Söhnholz, the „FinTech“ company provides diversified, forecast-free portfolios on its website www.diversifikator.com. Target groups are financial intermediaries (B2B) as well as private clients (B2C). For the website users, “Test-it-Yourself”-Tools show appropriate portfolio allocations and scenarios in an easy, fast and intuitive way. Further, users are pointed to external financial planning resources. At present, Diversifikator offers seven, completely rule-based portfolios.

Some of the distinguishing features are the allocation which considers all globally available assets, ETFs selected on ESG criteria, and an Alternatives portfolio.



Our Role

QAP advises Diversifikator on quantitative analysis, ETF selection, and the realization of the website and mentioned tools.

Continuously, QAP delivers the portfolio calculations as well as the corresponding risk and return figures from our in-house bookkeeping logic for investment strategies (BLIS). The internally developed and maintained mapping of master data, time series, and individual fields for ETFs enables an efficient implementation for simulations.

Our strength – providing a holistic solution that combines asset management expertise with technology and implementation – is particularly required for serving this client and the ongoing project.