NAVCALC.COM

CLIENT PORTAL

Trust that sells: A new generation client portal

The real difference lies in the details – and in the impression you leave.

Today, it's no longer about whether you have a client portal – but how well it works.

Your investors expect more than just returns. They want to feel their money is in the right hands – and be able to verify that anytime, from anywhere. And if they think of something else? Thanks to the client portal, you can respond instantly.

Today, it's no longer about whether you have a portal. It's about what the investor experiences when using it.

That's what determines whether they stay with you or go elsewhere.

Our client portal uses technology that serves not only the investor but also you:

- **User analytics** – see what interests your investors, where they spend time – and when it makes sense to reach out.
- **Boosts sales and streamlines fundraising** – because investors always have information at hand – instantly, without friction.
- **Simplifies work for the entire team** – sales, client service, portfolio managers, and back office.
- **Automates information transfer** – from the management company to clients and across the distribution network.
- **Ensures clients always have access to their data** – real-time, clear, and anytime.
- **Sends notifications, statements, alerts** – automatically, with no extra effort.
- **AI Module –** optional implementation of a standalone AI module (AI knowledge base, AI personalization, AI CRM system) for even better communication with clients and employees.

Why does it work?

Because trust is not built by numbers only.

The client portal is not just a tool – it is a bridge between the investor and you.

Curious to see what the portal could look like for your fund?

We'll be happy to show you a working demo and prepare a tailored proposal.

Jiri Simonek

Experienced developer, mathematician, and a key member of the implementation team. Jiri has been active in tech development and entrepreneurship for over 15 years. His experience and strategic thinking are crucial for the growth and evolution of the NAVCalc platform.

+420 606 893 039
@ jiri.simonek@navcalc.com

Ondrej Konak

Portfolio Manager with over 17 years of experience in investment banking, gained in groups such as PPF, Generali, and KBC. With deep knowledge of financial markets and hands-on experience from investment firms, he provides valuable expertise for the development of NAVCalc.

+420 724 386 109
@ ondrej.konak@navcalc.com