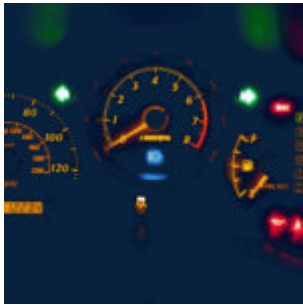


Build and Use the Ultimate Risk Dashboard: 5 Easy Steps



We live in an era of information overload, and research has consistently shown that switching between multiple tasks — as we often do on digital platforms — lowers our productivity.

However, when used correctly, experts believe that tech can help us reduce digital distractions and streamline our work to get more done.

One way to turn down the digital noise is to create one centralized workspace — a dashboard that contains your essential tasks and information, all unified and easily accessible.

For busy advisors, Orion's core tech solution strives to be that place. And with Orion's introduction of Risk Intelligence, mission-critical risk functions now live within your dashboard. This makes it easier to get more done and deliver at a higher level for your clients.

Ready to learn how Risk Intelligence integrates with other Orion core tech to create a central place to build, maintain, and grow your thriving practice? Here are the five ways to use Orion Risk Intelligence and key integrations to build the ultimate risk dashboard and get the most from it.

1. Get To Know Portfolio View

For Orion core tech users, the Orion Connect dashboard is the hub for all vital client activities. The portfolio dashboard view presents an overview of crucial information on each client, including:

- Client summary
- Allocation
- Activity
- Performance
- Gain/Loss
- Income
- Planning
- Trading
- Editor
- Risk Intelligence
- Stress testing

Risk Intelligence and stress testing are new integrations available to Risk Intelligence users, and they allow you to engage with crucial risk features from within Orion Connect. Rather than switching out to another risk platform, risk tools can be applied to your client's portfolio all in one place. Simply click on the "Risk Intelligence" or "Stress Testing" tab to access the tools.

2. Adjust Your Risk Dashboard

Once you navigate to the Risk Intelligence tab within Orion Connect, you gain access to the risk profile for your client's current allocation, including:

- Holdings
- Stress test risk and return
- Performance history
- Risk measures
- Correlation risk
- Equity sector analysis
- Morningstar style boxes
- Drawdown analysis
- Equity geographic analysis

You also have the option to filter what you see on the screen based on the level of detail you'd like to see in your allocations breakdown. You can also limit by timeframe or asset types. Finally, filter by fees, performance, fixed income or

equity analyses, and risk to see only the most relevant information.

In short, you can make the risk dashboard your own.

3. Leverage the Risk Dashboard's Flexibility on Client Calls

The versatility of the Risk Intelligence dashboard makes it easier for you to complete your daily work, but it can also enhance those times when you speak with clients.

The best client conversations involve active listening and responding in real-time to client questions or concerns. With a flexible risk dashboard, you can adjust views or filters on the fly to guide the conversation.

Let's say your client expresses concern about the Chinese economy and wants to minimize their APAC exposure. The equity geographic analysis breaks out their portfolio allocations by region, with a map visualizing the percentages in each region.

Because the tool is visually-driven, you can easily share your screen with clients. Whether meeting in-person or virtually, show the risk dashboard to your client, and they can see their APAC exposure for themselves. The visuals are designed to be easily digestible for novice and experienced investors alike.

4. Take Advantage of Integrated Stress Testing

The Risk Intelligence integration within Orion Connect also puts portfolio stress testing right at your fingertips. This tool can also play a pivotal role in guiding client check-in conversations.

Clients often call with concerns about the latest macro risk in the headlines. With Orion's integrated stress testing feature, you can quickly run stress testing from within your Orion Connect dashboard.

Within the stress testing tab, you can adjust key economic levers manually or

select from one of the dozens of scenarios based on real-world macro risks. If your client is worried about the Fed rate hikes, there is a stress-testing scenario for that. One click on the risk dashboard will run your client's current allocation through the scenario and provide immediate insight into upside and downside risk to your client's portfolio.

5. Bonus: Eclipse Trading Integration

The risk dashboard isn't just for use at the client level; Risk Intelligence also integrates with Eclipse, Orion's trading platform, to allow you to run stress testing and risk analytics on any models you use, without restriction.

The risk dashboard for your models provides an overview of risk majors, just as it does at the client level, but in Eclipse, it's also easy to make improvements to your model if needed.

The Risk Intelligence integration with Eclipse allows you to adjust models with three unique tools:

- **Interactive editor:** The interactive editor allows you to edit your model freehand, swapping and adding securities as desired.
- **Model optimizer:** With the model optimizer, you adjust the risk score on a given model. The optimizer tool then automatically shifts allocations within the model to align with the newly-assigned risk score.
- **Blend models/funds:** The blend model and funds function allows you to pick and choose which securities you'd like to swap out and replace them with SMAs, fixed income products, or individual securities.

The final piece of the Eclipse integration is the ability to run stress testing at the model level. After you've made your initial adjustments, test the updated version in various scenarios to see how it performs. If you're unhappy with the results, you can continue to adjust the model and re-run stress testing until you have a result you're comfortable with.

Technology can help you streamline your daily tasks in a way that facilitates firm growth. By optimizing your workflow, you create the space for more prospecting conversations, better client service, and a less stressful day for you and your

team.

To see how Orion Risk Intelligence can enhance your existing tech stack, reach out to our team for a demo.

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