ORION ADVISOR TECH

ASTRO eclipse

SMA Optimizer + Trading & Rebalancing Platform:
A Perfect Marriage for Direct Indexing

Unifying In-House Trading Tools to Unlock Direct Indexing Efficiencies

When you need a premier, tax-intelligent rebalancing platform, you look to Eclipse trading. When you need a powerful portfolio optimizer that enables fully custom, direct-indexed SMA portfolios, you look to ASTRO.

We think you should be able to do both in one place. So we married the best parts of both platforms together.

Through this union, we embedded ASTRO's direct indexing functionality into Eclipse trading[1], empowering you to create custom direct indexed portfolios from five pre-defined models.

Direct indexing is the process of replicating a broad market index through the direct purchase of individual securities—rather than the index itself. With ownership of the underlying securities, advisors can add additional tax alpha to client portfolios through tax loss harvesting and capital gains deferral.

Harnessing the Power of Direct Indexing in One Central Location

Increase Efficiency

Save valuable time by optimizing and trading portfolios without jumping between trading tools

Decrease Risk

Secure your client data by never having to export, send, and import it elsewhere

Differentiate Your Services

Offer the truly custom, tax-efficient SMA strategies that go above and beyond client expectations

[1] The direct Indexing functionality inside Eclipse trading requires a $1000 minimum balance in ASTRO.

Assisting You with Client-Specific Constraints & Advanced Alerts

Create custom portfolios with personalized restrictions

Environmental, social, governance (ESG)

Security

Sector or industry

Capital gains

Take immediate action when optimization needs are identified

Out-of-tolerance alerts: tracking error, risk (standard deviation), and cash

Tax-loss harvesting opportunities

New template assignments

Notifications will be sent immediately when out-of-tolerance alerts, tax-loss harvesting opportunities, and new template assignments are identified.

Getting Started with Five Predefined Direct-Indexed Models

ASTRO is designed to make building and implementing direct indexed models simpler than ever before, with guided index replication, easy-to-use filtering options, and automated alerts and prompts. Within Eclipse trading, ASTRO simplifies the approach further, with five predefined direct indexed models that can easily be selected, customized, and implemented into your client portfolios.

Model Name	Target Strategy	Buy List	Total ETF Holdings	Security Max	Security Exposure	Tracking Error
Core US Large Cap Model	iShares S&P 500	Holdings of the iShares S&P 500 ETF	~500	150	0 - 100	0.05 - 1.5
Core US Small Cap	iShares Russell 2000	Holdings of the iShares Russell 2000 ETF	~2000	250	0 - 100	0.05 - 1.5
Core US All Cap	iShares Russell 3000	Holdings of the iShares Russell 3000 ETF	~3000	350	0 - 100	0.05 - 1.5
Core Global	iShares MSCI ACWI	Holdings of the iShares Russell 3000 & ADRs	~1500	250	0 - 100	0.05 - 1.5
Core International Developed	iShares MSCI EAFE	ADRs	~1000	200	0 - 100	0.05 - 1.5

Custom direct indexed models can also be created from scratch within ASTRO and imported into Eclipse trading—giving you flexibility to replicate virtually any index and access it for future use in one central system.

Direct indexing has never been simpler—it's finally time to give clients the unique portfolios they deserve. Ready to get started?

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0590-OAS-6/10/2019