
ebi enhances its adviser portal in major tech upgrade

ebi, the award-winning discretionary fund manager and innovative disruptor, has upgraded its online portal The Vault, as it continues to invest in its adviser-facing technology.

The Vault hosts a suite of interactive charts, collateral, and presentation tools designed to make it easy for advisers to graphically explain ebi's investment solutions and portfolio performance to clients.

Returns and performance data, risk vs reward charts, and detailed portfolio breakdowns can be quickly accessed and presented during client meetings.

A user-friendly dashboard houses a range of apps and tools in one place providing a more personalised and streamlined experience. Advisers can quickly access cashflow software, training materials, a due diligence hub and much more.

Advisers can customise the look of the dashboard and the documents they send to clients by uploading their own brand logo and colours to The Vault.

ebi's Chief Operating Officer Harry Hitchcock commented: "We are proud to offer advisers access to our first-class technology solution The Vault. This online portal makes it easier than ever for advisers to deliver great service to their clients, with configurable options and customisation at every step. At ebi we are investing in technology and listening to adviser feedback in terms of the capabilities they most want to see. We look forward to adding further enhancements and more new features to our market-leading proposition in the near future."

ebi recently celebrated hitting the milestone of £2bn in assets under management, as well as gaining B Corp status.

ebi became part of the Bristol-based Parmenion group last year.

For further information please contact:

Pippa Russell

+44 (0) 7740933120

pippa@russellcommunications.co.uk

Notes to Editors

Founded in 2010, ebi's sustained growth is driven by an innovative investment proposition in conjunction with an award winning technology suite.

Offering a range of passively managed investment products, ebi has particular expertise in sustainable and factor model portfolios.

ebi strives to be at the forefront of ESG investing. Observing a lack of low-cost, diversified, passive, systematic ESG investment solutions in the marketplace – rather than waiting for such products to become available, it collaborated with leading sustainable investment managers to introduce cutting-edge sustainable investment solutions that are fair, robust, and transparent for end-clients.

Launched by an IFA, ebi understands the requirements of advisers in supporting their clients. Its award winning technology helps facilitate client conversations, mitigate risk and supporting advisers and their business.

Acquired by Parmenion in 2022, ebi continues to operate independently, but with the support and resources to help it achieve its ambitious growth plans.

To learn more, [visit ebi.co.uk](https://www.ebi.co.uk).