

(/). Better portfolios, beautiful proposals, and firm-wide risk analytics in one platform.

Know Your Risks.

SCHEDULE DEMO

(/REQUESTDEMO.PHP?

CONTACTTYPE=DEMO)

TRY IT FREE

Executives



Risk Monitor

// For Executives

HiddenLevers Risk Monitor provides true

Leading advisory firms use the HiddenLevers Advisor Platform to gauge client risk tolerance, stress test portfolios, and build recommendations that limit risk while meeting future goals.

With custom proposal generation, advisors can generate branded proposals to present risk tolerance, fee attribution, stress tests, style and sector breakdowns, and much more.

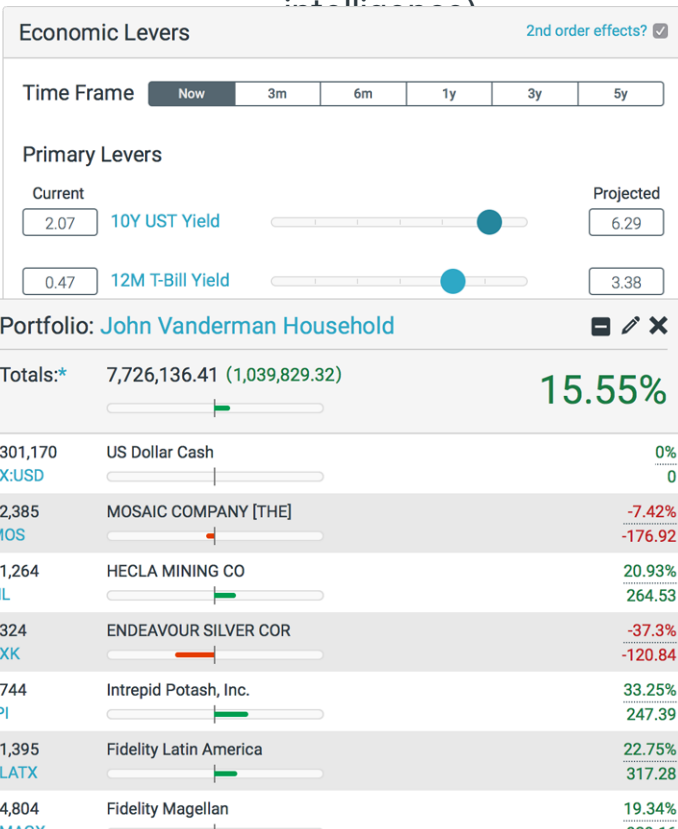
Demo Video

business intelligence for Financial Institutions - monitor risk to assets (AUM), clients, revenue, and profitability from the entire firm all the way down to the individual advisor's book of business.

With customizable monitoring and visualization of risk, asset flows, asset drift, and firm-specific KPIs, executives can manage growth and complexity in real time.



[Learn More \(/risk-monitor-business-intelligence\)](#)



Portfolio Analytics + Stress Testing

// For Portfolio + Asset Managers

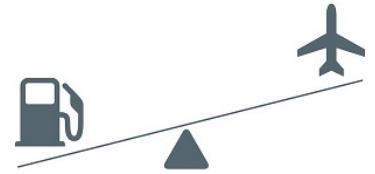
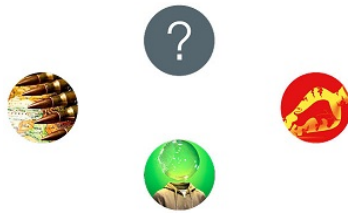
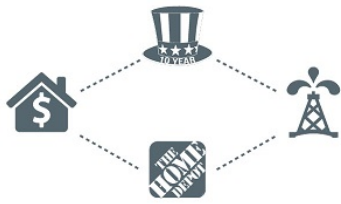
Use HiddenLevers to stress test and perform comparative analytics on individual securities, portfolios, households, and models. The platform analyzes stocks, bonds, ETFs, mutual funds, annuities, SMAs, real estate, options, and currencies, and also enables the upload of return series to analyze virtually any private investment.

Portfolio construction, portfolio optimization, and investment screening are powered by econometrics and factor exposure, and fund decomposition by sector / style / geography / asset allocation rounds out a comprehensive analytics platform.

[Demo Video](#)

[Learn More \(/requestDemo.php?contactType=demo\)](#)

(/)



Find the Connections

[Learn more \(/how-it-](#)

HiddenLevers ^{works)} uses big data to measure millions of relationships between the economy and investments. Interest rates affect home sales and oil prices, which impact the price of Home Depot stock. We uncover these links for 35,000+ investments.

Ask the Big What-ifs

[Learn more \(/how-it-](#)

HiddenLevers ^{works)} research team creates scenarios to model recessions, crises, and other economic events, using historical research and analysis on how economic indicators are correlated.

Model the Impacts

[Learn more \(/how-it-](#)

In a stress test, ^{works)} investment performance is projected using the relationships measured in step 1, applied to the scenario assumptions in step 2. If a scenario forecasts oil to rise, and Exxon is correlated with oil, then Exxon will rise in that scenario.

News

[See All \(/press\)](#)

June 2019

May 2019

Mar 2019

War Room: IPO R...

Focus Financial T...

Mar 2019

Dec 2018

Register for the HiddenLevers + Orion Webinar: Risk Monitor Business Intelligence

BI Platform Launc...

Asset Manager Eu...

[See All \(/events\)](/events)

[See All \(/blog\)](/blog)

September

17-19

SS&C Deliver

(<http://www.ssctech.com/deliver>)

2019

Join us for the industry's premier event for executives and decision-makers across all SS&C solutions seeking hands-on learning, industry insights, and networking.

Resonant Capital Redefines Client Experience Using HiddenLevers

Unböring Tools

6/14/2019

When Resonant Capital Advisors was formed in late ...

[Read More \(/blog/post/resonant-capital-streamlines-the-client-experience-with-hiddenlevers/?id=1928\)](/blog/post/resonant-capital-streamlines-the-client-experience-with-hiddenlevers/?id=1928)

The Future is Here: HiddenLevers + Orion Business Intelligence Integration

Gain Deeper Firm-Level Insight with the ... 5/28/2019

[Read More \(/blog/post/the-future-is-here-gain-deeper-firm-level-insight-with-the-hiddenlevers-orion-business-intelligence-integration/?id=1900\)](/blog/post/the-future-is-here-gain-deeper-firm-level-insight-with-the-hiddenlevers-orion-business-intelligence-integration/?id=1900)

November

4-7

Schwab Impact

2019

(<http://impact.schwab.com/>)

2019

IMPACT 2019 will be industry's largest gathering of experts and forward-thinking advisors.

The Number One Tool for Fiduciaries

...starting his career in financial ser... 5/14/2019

[Read More \(/blog/post/the-number-one-tool-for-fiduciaries/?id=1876\)](/blog/post/the-number-one-tool-for-fiduciaries/?id=1876)

War Room: IPO Reckoning

5/7/2019

The last time the IPO calendar was this intense was...

[Read More \(/blog/post/war-room-ipo-reckoning/?id=1874\)](/blog/post/war-room-ipo-reckoning/?id=1874)

Assets on HL Platform: **\$456,042,485,840**

[\(/testimonials/brad-clipard.html\)](/testimonials/brad-clipard.html) glad to

see your firm continues its commitment...

Brad Clipard

<https://hiddenlevers.com>

HiddenLevers helps ad

Rob Vaughn

Senior Director of Oper

(/).

About HiddenLevers

HiddenLevers is a risk technology platform, providing next-level applications, analytics and economic research for the wealth management space. With over \$400 billion in assets on its platform, HiddenLevers offers client-facing and home office solutions aimed at executives, financial advisors, asset managers, and portfolio managers. The cloud-based platform includes a cutting-edge macro-scenario library, portfolio stress testing, model construction, investment proposal generation, and enterprise risk and revenue monitoring. HiddenLevers remains a self-funded company, headquartered in Atlanta, Georgia.

Featured In

THE WALL STREET
JOURNAL.

BARRON'S



Financial
Planning
INVESTED IN ADVISORS

MORNINGSTAR

RIABiz

CRAIN'S
NEW YORK BUSINESS

InvestmentNews

Atlanta

115 N. McDonough St.
Decatur, GA 30030

Contact



(<https://twitter.com/HiddenLevers>)



(</blog>).

Product

[Advisor Platform](#)

[Asset Manager](#)

[Platform \(/asset-](/asset-Platform)

Resources About

[How It Works \(/how-it-works\).](/how-it-works)

[Blog \(/blog\).](/blog)

[News](#)

[Company.](#)


[\(/inc/mc-signup.html\)](/inc/mc-signup.html)

[managers\)](#)
Product
[Risk Monitor \(/risk-monitor-business-intelligence\)](/risk-monitor-business-intelligence)

Resources
[Knowledge Base](#)
[. \(http://help.hiddenlevers.com\)](http://help.hiddenlevers.com)

About
[Team \(/team\)](#)
[Partners \(/partners\)](#)

Log In (/l)

 [800.277.4830](tel:800-277-4830)
(tel:800-277-4830)

 [Live Chat](#)

© 2019 HiddenLevers

[Privacy \(/privacy.php\)](/privacy.php)

[Terms of Service \(/terms.php\)](/terms.php)

(L)