BETTER PORTFOLIOS THROUGH DEEP CUSTOMIZATION

The future of adviser technology is here

Type Your Email here...

REQUEST DEMO
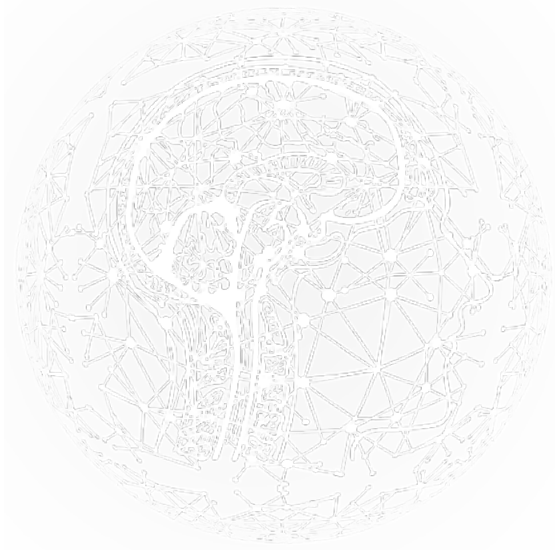
TECHNOLOGY BUILT BY INVESTORS

O'Shaughnessy Asset Management is a quantitative money management firm. OSAM has been managing client money since 2007 with team members managing our strategies back to 1996. The Canvas™ platform is our newest client-focused investing solution and service of O'Shaughnessy Asset Management, L.L.C.

The future of investing lives at the intersection of research and technology. Our team has spent decades building both and is turning our systems inside out to give other professionals access to build and implement their own strategies. We will keep improving every aspect of Canvas so your business and your clients' portfolios will, too.

LEARN MORE ABOUT OSAM

TOTAL CUSTOMIZATION THAT SCALES

Your firm's existing investment philosophy ✚ client-specific adjustments.

Client-Specific Strategy Design

Start with strategy templates built to express your firm's core investing tenets, then tailor a fingerprint portfolio for each client based on their circumstances and preferences.

Deep Operational Efficiency

Digital paperwork, easy onboarding, and efficient dashboards. Everything is built to be scalable for advisers. Canvas is your investing operating system.

Solve Unique Problems for Clients and Prospects

Manage single stock, portfolio, and career risk exposures. Optimize taxes. Adjust holdings for the investors' values.

WHAT STRATEGIES WILL YOU DESIGN?

In the past, advisers had to mix off-the-shelf products that weren't built with any one client in mind. Overlapping positions, unintended exposures, and high active costs are now a thing of the past. Control everything and build the most efficient strategies possible using these dimensions of customization:

Dimensions of Customization

ASSET ALLOCATION

FACTORS

DIRECT INDEXING

ESG

TAX LOSS HARVESTING

POSITION LEVEL CUSTOMIZATION

FIXED INCOME

Asset Allocation

Select weights to stocks and bonds, including region and market cap segmentation.

STRATEGY BUILDER

The world's most intuitive investing strategy interface.

View portfolio exposure based on your selections.

Completely customize your allocation.

Active/Passive
Market Cap
Region
Fixed Income
Factor

Instant feedback on the choices you make.

Design detailed strategies with a few clicks.

Geography & Market Cap Weights

Global Canvas Portfolio vs. MSCI ACWI
(Dot Size Scaled by Market Cap)

REQUEST DEMO

THE NEXT STEP IN INVESTING TECHNOLOGY

OSAM's investment philosophy, process, and experience in building portfolio management tools converge in the Canvas platform, delivering the ultimate adviser/client experience.

CANVAS™

The future in investing technology.

Index Funds
Diversified Beta at a Low Cost
1970s

ETFs
Access to Cheap Beta
1990s

Tax-loss Harvesting
Introduction of tax optimization for clients

Robo Advisors & PM Software
Brought simplification and improved

OSAM BLOG & RESEARCH

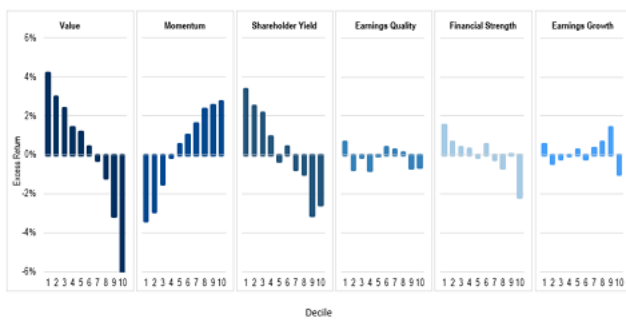We are committed to teaching and building tools to make life easier for professional investors. Follow along:

The Factor Archives: A History of Factor Investing

Jamie Catherwood introduces a new factor series. In part 1 he provides a general exploration of modern factors and their historica roots.
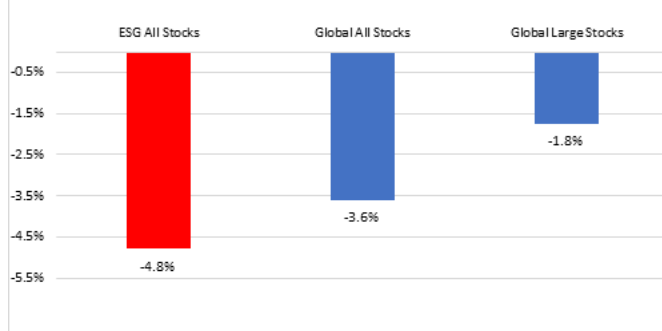
O'Shaughnessy Quarterly Investor Letter Q3 2019

Patrick O'Shaughnessy discusses Q3 factor performance, promising signs for Value, and early Canvas learnings.

Figure 3: Removing Poor Quality in ESG (Excess Returns 1986-2019)

ESG the Right Way: Customization and Not Scale

Travis Fairchild, CFA has led OSAM's ESG research. Here he discusses our findings on ESG investing. This is OSAM's first whitepaper on this evolving investment preference.

DON'T MISS NEW RESEARCH

THINK OF A SPECIFIC CLIENT OR PROSPECT AND LET US HELP YOU BUILD YOUR FIRST STRATEGY.

REQUEST DEMO

CANVAS™
An investment service of O'Shaughnessy Asset Management, LLC

(203) 975-3333

6 Suburban Avenue Stamford, CT 06901

CONTACT INFO

info@osam.com

For members of the press contact

ena.gong@osam.com

ABOUT

Home

OSAM

Disclosure

Legal

Use of the CANVAS™ platform is subject to the terms, conditions and limitations set forth here.