

## Media Release

### BT WRAP RESPONDS TO INCREASING EQUITY DEMAND WITH MULTI-CLIENT BULK ORDER TRADING

**EMBARGOED TO MONDAY, 15 MARCH 2010**

BT Wrap today launched another round of platform enhancements delivering optimum trading functionality to meet increasing adviser and client demand for equities and Exchange Traded Funds (ETFs).

Head of BT Wrap, Chris Freeman, said demand for equities through the platform has increased as advisers return to growth investment strategies and client confidence in listed securities improves.

“We’re really excited to see client confidence returning, which has certainly been evident by a three-fold increase in the flows we’ve seen into equities compared to the same period last year,” Chris said.

Research by Investment Trends indicates 50 per cent of planners expect their level of involvement in share trading for SMSF clients to increase over the next 12 months, and the use of ETFs has trebled over the past year.<sup>1</sup>

“As markets recover and investors continue to move from cash to equities advisers need a platform solution that allows them to respond quickly – to take advantage of market opportunities but also better manage risk,” Chris said.

“However, from the many discussions we’ve had with advisers, what generally tends to stop them growing their equities book as fast as they would like is the administration burden involved in trading equities across a large and diverse client base of individuals — each with unique needs.

“It’s a classic scalability problem — how do you serve large numbers of highly individual clients in a cost-effective fashion?

“Our Multi-client Bulk Order trading functionality allows advisers to better service their equities clients by giving them the power to bulk trade for clients who would benefit from the same trading strategy or have similar investment needs.”

The new Multi-Client Bulk Order equities trading functionality includes:

- The ability to buy or sell a single listed security for up to 25 clients on the one screen - in one go
- Build carefully targeted client lists based on a wide range of search criteria

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<sup>1</sup> Investment Trends 2009 SMSF Planner Report

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- A new onscreen calculator instantly calculates the number of listed securities an adviser can buy or sell for a given dollar amount
- Access to new integrated on screen, real time market prices.

Chris added the enhancements helped advisers streamline their back office and reduce administration costs, ultimately leading to improved profitability.

“As well, the functionality reaffirms our commitment to ensure advisers are well placed to take advantage of the growing SMSF market - especially as this segment’s appetite for equities remains robust,” he said.

“We believe platforms need to evolve by taking a very customer centred approach to the development and design process. We’ve worked very closely with a number of advisers across the country to ensure the functionality is not only fast, but also very easy to use. ”

Chris concluded the enhancements built on the initial trading enhancements launched early last year and represent the second stage of Wrap’s strategy to build a market leading equities capability. Work is also underway on a sophisticated, hybrid models solution that is expected to launch later this year.

### **For further information contact:**

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### **About BT Wrap**

BT Wrap sits within the Super & Investment Solutions unit of BT Financial Group. BT Wrap’s \$38 billion platform business attracts more than one in four investment dollars coming into the Australian platform market. BT Wrap won ‘Best Investment Platform’ at the 2009 Financial Review Smart Investor Blue Ribbon Awards and was voted the industry’s ‘Most Popular Primary Platform’ in the 2008 Wealth Insights Adviser Trends report.