

Actionable, Investment Intelligence for Financial Professionals







A global equities research and investment solution for professionals

HALO Professional is a Global equities research and investment solution that provides professionals with actionable, institutional-grade investment intelligence across 35,000 companies, and over 30 different global exchanges.

Global Company Data



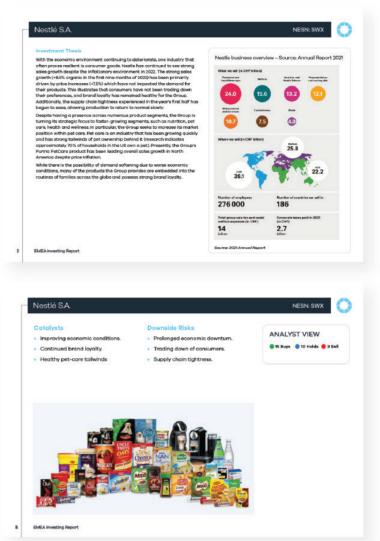
Powered by FactSet, HALO Professional provides a more complete view of company financials.

While other equities research solutions may only provide a historical snapshot of a company's financials, HALO Professional is able to deliver deeper insights with market analyst forecasts from some of the world's biggest research firms.

Get a better picture of the historical performance of a company's profit and loss statements, balance sheet, cash flow and more. Determine how well a company is likely to perform up to 3 years in the future, using the future forecast data.

Global Company Research





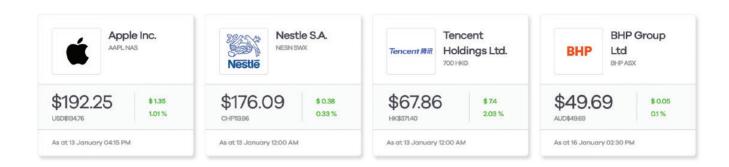
With access to a range of global company research reports and market commentary from experienced global equities analysts, Professionals can find new ideas and make more informed investment decisions for their clients.

Upgrade your HALO Professional subscription to receive regular international market updates and expert trade ideas on innovative companies around the world including the Americas, Asia and Europe, the Middle East and Africa (EMEA).

GLOBAL INVESTING SIMPLIFIED



Giving the confidence to invest globally.



Investing directly in international equities has never been easier with HALO Professional.

Our market-leading omnibus and custody trading interface makes HALO Professional one of the most powerful global equities investment solutions available on the market today.

Professionals can trade in over 35,000 shares and ETFs across 30 international exchanges, including the ASX, NASDAQ, NIKKEI and more, through a single, intuitive trading solution.



Competitive Fees

Our fee structure is among the most simple, transparent, and competitive in the market. Fees and charges include:

- Monthly subscription of \$290+gst.
- ✓ Brokerage is \$15 per trades under \$12,500 or 0.12% over \$12,500.
- ✓ A Foreign Exchange fee of 0.5% per trade.
- ✓ If invested in Vue's, a research fee of 0.8% p.a per Vue.



Safe and Secure

Invest with confidence knowing that your assets are held in custody by one of the world's biggest and most respected brokers.



Business and Client Reporting

Online applications, transaction statements and corporate action support, designed to help you save time and become more efficient for both your clients and your business.

Invest in the world's biggest investment trends

Explore our selection of ready-to-invest thematic portfolios centered around the world's biggest investment trends including Artificial Intelligence, Car of the Future, Clean Technology and more.

Each portfolio is comprised of 10 companies hand-selected by our expert investment committee with decades of experience in global equity markets.

With daily monitoring and updates, HALO Thematic Portfolios are a low-cost, time-effective way to invest in the world's largest and fastest growing companies.















Always available anywhere, anytime



HALO Professional is accessible anywhere thanks to our intuitive mobile app. Simply download HALO Mobile from the App Store or Google Play and log in to get access to your portfolio and our suite for research and investment tools.





POWERFUL INVESTMENT TECHNOLOGY



Market-leading research and investment tools

HALO Professional has the tools Professionals need to help make an informed decision for their clients.

Market-Leading Charting Interface

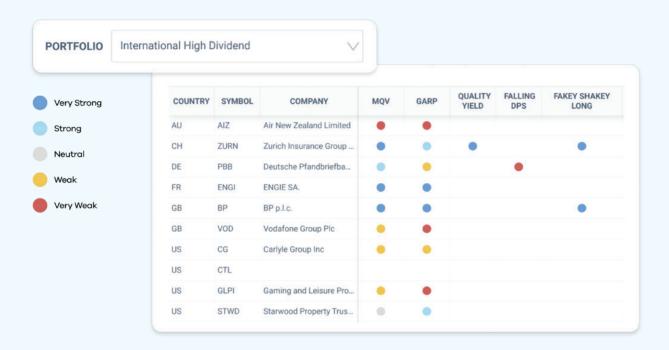
At the core of HALO Professional is our market-leading charting interface.

Truly understand the trajectory of a company's share price by visualizing price, profitability, market expectations, events, and signals on a single, fully customizable chart.



Signals & Monitors

Take the guesswork out of when to buy and sell a stock in any market condition and easily identify potential entry and exit points on the companies you are interested in.



Detailed Financials

HALO Professional gives access to historical company financial data as well as the key forward-looking variables that market analysts will forecast in their models.

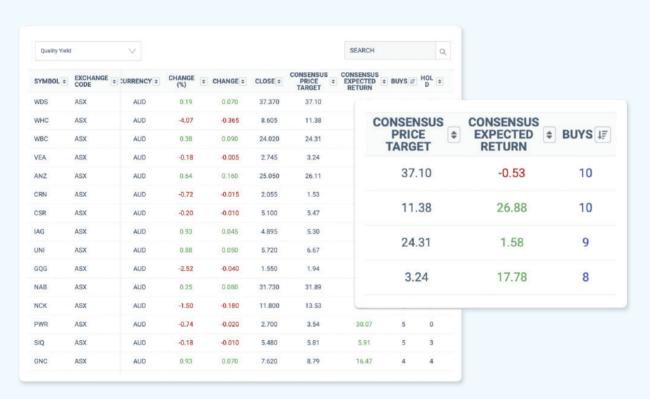


Broker Consensus

You can now invest with confidence with aggregated broker consensus recommendations and EPS revisions from the world's biggest research firms.







Find better client opportunities, faster

HALO Professional allows you to quickly identify and act on equities investment opportunities for your clients' portfolios.

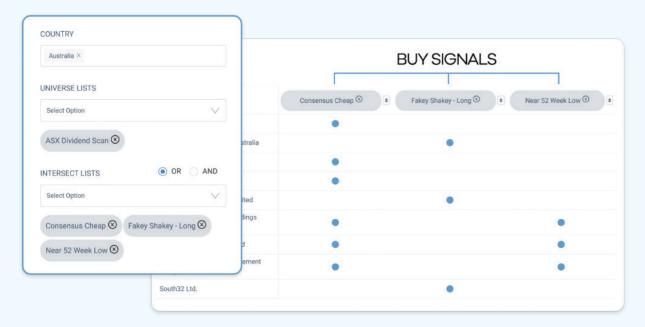
Stock Scanner

Scan entire global exchanges in seconds for opportunities that match your client's investment goals. Turn your scans into watch lists that update daily with new companies that match the criteria to save time and automate your investment idea generation.



Stock Blender

Easily identify double, triple and even quadruple-blessed opportunities in any market. Combine your watchlists with any number of monitors, universes, and regions to find the right stocks to buy at any point in time.



Powerful tools for dividend investors

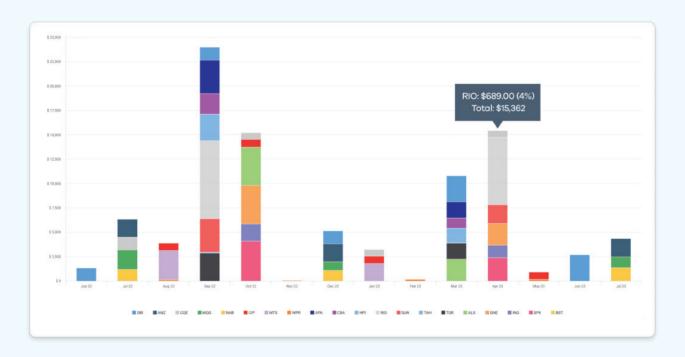
HALO Professional is ideal for clients who are focused on dividends and looking to build a reliable income portfolio to fund their lifestyle.

Our income philosophy is built around finding companies that provide an above average yield and are continuing to increase their dividend per share (DPS) over time through steady earnings growth, or what we like to call Quality Yield.

This unique income investing philosophy helps HALO Professional users find reliable, high-yield income opportunities while better protecting the client's capital.

Expected Dividends Chart

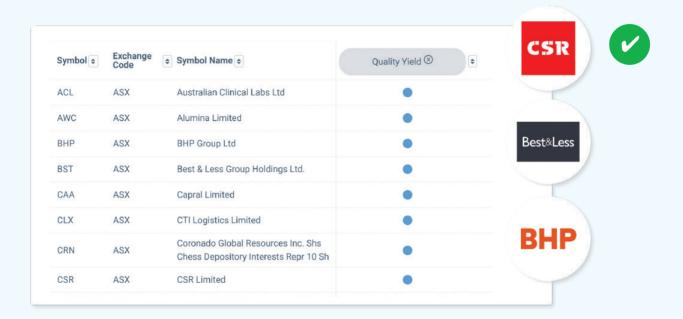
The Expected Dividends Chart calculates and visualizes all of the dividend payouts your clients are likely to receive from their holdings and lets you know which month they can expect them on a rolling 18-month forecast.



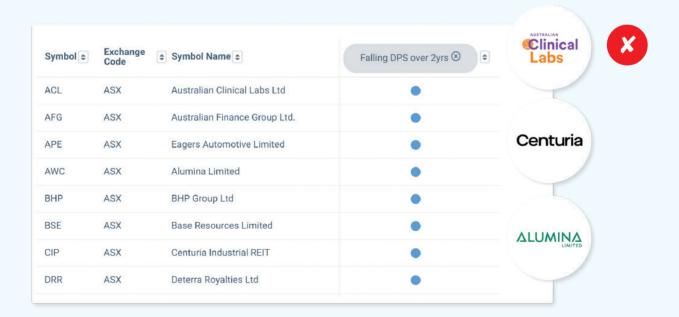
Dividend Monitors

HALO Professional offers two unique monitors to help find more sustainable dividend stocks.

The **Quality Yield monitor** is an automatically updating list of stocks that offer a minimum 5% dividend yield, show positive Dividend Per Share growth and have low leverage. This can help identify blue chip stocks that pay high dividends.



The **Falling Dividends Per Share (DPS) monitor** is a risk management tool for income investors and provides a list of companies that analysts expect to have negative Dividend Per Share growth over the next two years.



Powerful portfolio management

HALO Professional gives access to portfolio management tools that go beyond raw performance.

Actionable Performance Tracking

HALO Professional allows you to compare client share performance against a variety of benchmarks. Determine which shares are the major contributors to each client portfolio's performance and which shares are on the decline. Better understand client portfolio's asset and sector allocation and how they work towards their investment goals.



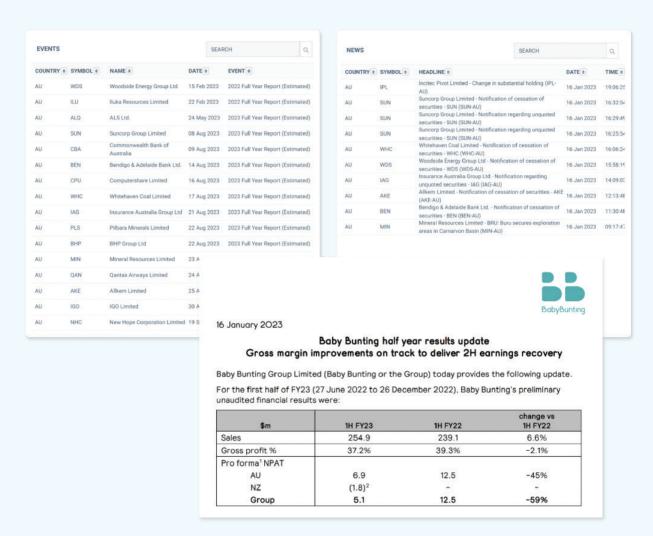
Portfolio Signals

Stay on top of your client's holdings with institutional-grade signals across their portfolio. Identify ideal positions to further accumulate and see which positions to take profit on or exit completely.



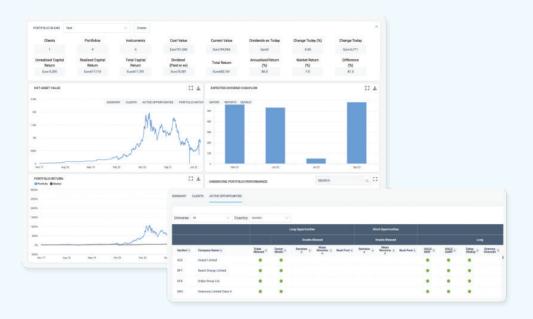
Events & Research

HALO Professional makes it easy to stay up to date with the latest news, upcoming events and expert commentary on the stocks you hold. You can access all relevant reports and updates directly from the portfolio tab.



Better client management

Better understand your client's portfolio and the companies they hold with the advanced portfolio management tools available on HALO Professional.



Adviser module



Summary section

Professionals can obtain high level reporting to summarise their clients total portfolio blend including, their net asset value over time, expected cashflow and the underlying portfolio return. Professionals can also track monthly brokerage payments by individual platforms and subscription revenue.



Client section

HALO Professional makes it easy for businesses to keep track of individual client activity including, brokerage paid overtime, subscriptions and fee amounts, portfolio summary and trade activity.



Import section

Provides Professionals with the capability to bulk upload transactions that have taken place on another trading platform, allowing a more holistic view of client activity.



Reporting section

Professionals can generate several reports specific to their business and client's needs.

Get in touch, we would like to show you more!



Schedule a demo

See if HALO Professional is right for you by booking in a obligation-free walkthrough with one of our Business Development Managers.

- **1300 425 622**
- professional@halo-technologies.com



To activate a free 30-day trial:

See if HALO Professional is right for you by signing up to a 30-Day free trial.

halo-technologies.com/global/free-trial



Professional services team

Our dedicated Professional Services team is available to answer your questions and help you to get the most out of HALO Professional.

You can reach us by phone, email, or in real-time live chat Monday to Friday 9am to 5pm AEST.

- 1300 425 622
- professional@halo-technologies.com
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Important Information

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