

Platforum Benchmarking for Parmenion

User leaderboard March 2019

The following has been prepared by independent research firm, Platforum, benchmarking the Parmenion platform against other adviser platforms over the Q4 2018 period.

Platforum has collected over 2,000 user reviews of platforms over the last year. Advisers are asked to rate platforms on ten criteria. The scores reflect the aggregate views of users of each of the platforms over a 12 month rolling period.

User Leaderboard – platforms under £12bn AUA

Ranking	Platform	Total (max 50)
1	Parmenion	44.20
2	7IM	43.52
3	Zurich	39.30
4	Novia	38.68
5	Alliance Trust Savings	33.02

User Leaderboard – all platforms

Ranking	Platform	Total (max 50)
1	Parmenion	44.20
2	Transact	44.13
3	7IM	43.52
4	AJ Bell Investcentre	42.69
5	Nucleus	40.55
6	Old Mutual Wealth	40.22
7	Elevate	40.05
8	Standard Life Wrap	39.76
9	Zurich	39.30
10	Novia	38.68
11	FundsNetwork	37.35
12	James Hay	36.44
13	Aegon (ARC)	35.12
14	Ascentric	34.60
15	Aviva	34.42
16	Alliance Trust Savings	33.02
17	Aegon Platform (ex. Cofunds)	27.73

User Leaderboard (all platforms) – Parmenion's historic performance

	Q1	Q2	Q3	Q4
2018	2 nd	1 st	1 st	1 st
2017	2 nd	2 nd	2 nd	2 nd
2016	1 st	2 nd	2 nd	2 nd
2015	1 st	1 st	2 nd	2 nd

Adviser reviews by individual metric

	Metric	Parmenion	Market average
1	General web usability	4.58	Highest: Parmenion (4.58) 3.76 Lowest: Aegon Platform (ex. Cofunds) (2.65)
2	Ease of doing business	4.52	Highest: Parmenion (4.52) 3.82 Lowest: Aegon Platform (ex. Cofunds) (2.55)
3	Quality of reports	4.44	Highest: Parmenion (4.44) 3.74 Lowest: Aegon Platform (ex. Cofunds) (2.73)
4	General opinion and rating	4.58	Highest: Transact (4.69) 3.93 Lowest: Aegon Platform (ex. Cofunds) (2.58)
5	Value for fees charged	4.48	Highest: Alliance Trust Savings (4.65) 3.96 Lowest: Aegon Platform (ex. Cofunds) (3.12)
6	Quality of customer service	4.42	Highest: Transact (4.57) 3.76 Lowest: Aegon Platform (Cofunds) (2.40)
7	BDM Support	4.42	Highest: 7IM (4.69) 3.69 Lowest: Aegon Platform (ex. Cofunds) (2.80)
8	Technical Support	4.36	Highest: Standard Life Wrap (4.38) 3.78 Lowest: Aegon Platform (ex. Cofunds) (2.57)
9	Usefulness of online tools	4.25	Highest: Transact (4.29) 3.66 Lowest: Aegon Platform (ex. Cofunds) (2.67)
10	Choice of funds and tax wrappers	4.15	Highest: Transact (4.82) 4.25 Lowest: Aegon Platform (ex. Cofunds) (3.66)
	Total	44.20	Highest: Parmenion (44.20) 38.34 Lowest: Aegon Platform (ex. Cofunds) (27.73)