

4.000 documenten, 40 outlets, 5 talen

Het belang van RIA in Robeco informatievoorziening

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Agenda

Het belang van RIA in Robeco informatievoorziening

1. Het belang van RIA in informatievoorziening voor financiële dienstverlener?

- Het belang van informatievoorziening voor Robeco
- Waarom middels RIA?
- Waarom kozen we voor Flex?

2. Het resultaat: de Product Selector

3. Onze ervaring met Flex

Belang van informatievoorziening

- **Productinformatie als beslissingsfactor beleggingsproduct**
- **4.000 documenten, 5 talen, 40 outlets / maand**
- **Informatiebehoefte verschilt tussen professionals**
- **Ambitie van Robeco: Investment Engineers**

 **Betere info-ontsluiting om aan ambitieniveau te voldoen**

Waarom middels RIA?

- Snelle, simpele toegang tot info: **single page interface**
- Klanten willen zelf werken met informatie
- Specifieke overzichten per outlet
- Robeco als investment engineer

 **Keuze voor RIA**

Waarom Flex?

Goede grafische- en multimedia kwaliteiten

- user experience

Technologie sluit goed aan bij de overige standaarden van Robeco, o.a. Tridion Content Management

Geïntegreerde ontwikkelomgeving

- Eclipse (vanaf Flex 2.0)

Snelheid en gemak van ontwikkelen in een P.O.C. aangetoond

- Koppeling met back-end (java)

Degelijkheid leverancier

 **Keuze voor Flex**

Resultaat: Product Selector

Eén pagina met

- Toegang tot online productpagina's
- Beschikbaarheid over 175.000 productgegevens
- Download centrum met 4.000 documenten

Voordelen voor onze klanten

- Customizable
- Te personaliseren
- Customer Insight

Oude situatie – Product Selector

Selector
 Toon uitleg

Selecteer hieronder uw fondsen

I. Alle beleggingsfondsen **Toon alle fondsen**

II. Selecteer met aanvullende criteria

Categorie Aandelenfondsen-sector ▾

Risico Laag Middel Hoog

Rendement laatste maand ▾ 1 % of hoger

Morningstar rating 1 ▾ ster(ren) of meer

Toon selectie

III. Direct naar specifiek fonds Robeco Balanced Mix ▾ **Toon fonds**

RESULTAAT


Fondsnaam	Categorie	Risico	Gem. rend. 1 mnd %	Morningstar Rating™
Robeco Energy Equities D EUR shares	Aandelenfondsen-sector	●●●●●○	2.70	★★★
Robeco Financials Equities D EUR shares	Aandelenfondsen-sector	●●●●●○	3.70	★★★
Robeco Food & Agri Equities D EUR shares	Aandelenfondsen-sector	●●●●●○	2.10	★★★
Robeco Industrials Equities D EUR shares	Aandelenfondsen-sector	●●●●●○	3.50	★★
Robeco Telecom Services Equities D EUR shares	Aandelenfondsen-sector	●●●●●●	5.40	★★★★★

Disclaimer Morningstar Rating™

Oude situatie - Overview

Selector Result

ASSETS UNDER MANAGEMENT September 2006

 print this page (Excel)

Fund name	Category	Currency	AuM*	Outstanding shares
Rabo Euro Enhanced Liquidity Fund - I	Money market funds	EUR	36.246.783	3.577
Rabo Euro Enhanced Liquidity Fund - R	Money market funds	EUR	201.656.231	19.897
Rabo RenteExtra voor Leden jan 04/11	Garantproducts (NL only)	EUR	-	-
Rabo Sterling Enhanced Liquidity Fund - I	Money market funds	GBP	1.019.936	100
Rabo Sterling Enhanced Liquidity Fund - R	Money market funds	GBP	121.397.788	11.900
Rabo US Dollar Enhanced Liquidity Fund - I	Money market funds	USD	1.024.431	100
Rabo US Dollar Enhanced Liquidity Fund - R	Money market funds	USD	245.901.383	23.999
Robeco	Equity-worldwide	EUR	7.120.753.867	255.681.598
Robeco Absolute Return (Class A)	Alternatives	EUR	-	-
Robeco AEX Garant dec 99/06	Garantproducts (NL only)	EUR	49.128.881	1.000.725
Robeco AEX Garant mrt 02/07	Garantproducts (NL only)	EUR	41.017.033	828.365
Robeco AEX Garant okt 02/07	Garantproducts (NL only)	EUR	31.524.019	467.360
Robeco All Strategy Euro Bonds D EUR shares	Fixed Income	EUR	79.141.455	1.251.891
Robeco Balanced Mix	Mixfondsen (NL only)	EUR	794.820.969	15.536.875
Robeco Chinese Equities D EUR shares	Equity-Region and country	EUR	146.635.477	5.071.558
Robeco Click the Best Garant Note August 05/11	Garantproducts (NL only)	EUR	-	-
	Garantproducts (All)	EUR	13.828.588	250.832

Nieuwe situatie www.robeco.nl/professionals

Robeco Product Selector

Compose your personal product information overview by choosing "edit columns".

Overview (tab 1 / 8)

Period

[Edit columns](#)

[Download as XLS](#)

!	Name	Category	Performance 3y	Ris
	Robeco	Equity-worldwide	12,50	●●●●●
	Rolinco	Equity-worldwide	13,10	●●●●●●
	MultiManager Asia-Pacific Eq. D EUR shares	Equity-Region and country	14,20	●●●●●●
	Global Equities D EUR shares	Equity-worldwide	11,60	●●●●●
	High Yield Bonds D EUR shares	Fixed Income	6,50	●●●
	European MidCap Equities D EUR shares	Equity-Region and country	21,10	●●●●●●
	European Equities D EUR shares	Equity-Region and country	15,50	●●●●●
	Financials Equities D EUR shares	Equity-sector	17,90	●●●●●●●
	Food & Agri Equities D EUR shares	Equity-sector	11,30	●●●●●●●
	North American Equities D EUR shares	Equity-Region and country	6,30	●●●●●●
	Property Equities D EUR shares	Equity-sector	24,30	●●●●●
	Industrials Equities D EUR shares	Equity-sector	10,80	●●●●●●●
	Chinese Equities D EUR shares	Equity-Region and country	16,80	●●●●●●●
	Telecom Services Equities D EUR shares	Equity-sector	14,90	●●●●●●●
	Consumer Goods Equities D EUR shares	Equity-sector	12,10	●●●●●●●

Past performance is not an indicator for the future and does not guarantee the future performance. The performance data do not take account of the commissions and costs incurred on the issue and redemption of units.

Product Selector

30 of 59 products found

- [Show all products](#)
- [Show overviewpage](#)

Name

Code

Category

Registered in

Performance

Period

Risk

Nieuwe situatie www.robeco.nl/professionals

Robeco Product Selector

Performance (tab 2 / 8)

Period: october 2006

Overview | **Performance** | Index numbers

Name	31-10-2006	15,50	4,40	9,40	-1,03
Robeco					
Rolinco					
MultiManager Asia-Pacific Eq. D EUR shares					
Global Equities D EUR shares					
High Yield Bonds D EUR shares					
European MidCap Equities D EUR shares					
European Equities D EUR shares					
Financials Equities D EUR shares					
Food & Agri Equities D EUR shares					
North American Equities D EUR shares					
Property Equities D EUR shares					
Industrials Equities D EUR shares					
Chinese Equities D EUR shares					
Telecom Services Equities D EUR shares					
Consumer Goods Equities D EUR shares					

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A1		Index numbers October 2006					
	A	B	C	D	E	F	G
1	Index numbers October 2006						
2	Name	Alpha 3y	Alpha 5y	Beta 3y	Beta 5y	ation ratio 3y	ation ratio
3	Robeco	-1,15	-2,72	1,0994	1,0957	-0,1334	-0,61
4	Rolinco			1,323	0,9873	0,8751	0,21
5	MultiManager Asia-Pacific I			9831	1,0338	-0,6519	-0,12
6	Global Equities D EUR share			0417	0,9892	-0,4894	-1,21
7	High Yield Bonds D EUR sha			9582	0,8839	-1,4907	-1,11
8	European MidCap Equities			9588	0,9531	-0,9544	-0,81
9	European Equities D EUR sh			1226	1,0188	-1,0985	-0,51
10	Financials Equities D EUR sl			1008	0,9882	0,7121	-0,01
11	Food & Agri Equities D EUR shares	1,66	0,4	0,9275	0,9698	0,2297	0,01
12	North American Equities D EUR shares	-2,28	-1,76	1,0174	1,0049	-0,5851	-0,31
13	Property Equities D EUR shares	-0,34	-0,26	0,9477	1,0069	-0,3766	-0,01
14	Industrials Equities D EUR shares	4,63	2,14	1,085	1,0134	1,1173	0,31

Category

Registered in

Performance¹⁰⁰ 100

Period: Month

Risk

Nieuwe situatie

www.robeco.nl/professionals

Robeco Product Selector

Compose your personal product information overview by choosing "edit columns".

Overview (tab 1 / 8)

Period

[Edit columns](#)

[Download as XLS](#)

!	Name	Category	Performance 3y	Risk
	High Yield Bonds D EUR shares	Fixed Income	6,50	●●●
	High Yield Bonds I EUR shares	Fixed Income	-	●●●
	European High Yield Bonds I EUR shares	Fixed Income	-	●●●

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Product Selector

3 of 59 products found

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[Downloads](#)

Name

Code

Category

Registered in

Performance

Period

Risk



Nieuwe situatie www.robeco.nl/professionals

Robeco Product Selector

Compose your personal product information overview by choosing "edit columns".

Performance (tab 2 / 8)

Period october 2006

[Edit columns](#)

Download as [XLS](#)

Overview	Performance	Edit columns	Index numbers	Product facts	Costs	Ratings	Annual
Name	<input checked="" type="checkbox"/>	Name	0416	5 years	5 years	Since start	Excess return
Robeco	<input checked="" type="checkbox"/>	Date	21-10-2006	0,00	0,50	8,90	0,56
Rolinco	<input type="checkbox"/>	1 month	21-10-2006	0,00	2,20	8,40	3,03
MultiManager Asia-Pacif	<input type="checkbox"/>	3 months	21-10-2006	0,00	12,90	7,00	-1,57
Global Equities D EUR s	<input type="checkbox"/>	1 year	21-10-2006	0,00	0,60	0,70	-0,20
High Yield Bonds D EUR	<input checked="" type="checkbox"/>	2 years	21-10-2006	0,00	8,90	5,70	-1,25
European MidCap Equiti	<input checked="" type="checkbox"/>	3 years	21-10-2006	0,00	12,90	8,10	-3,56
European Equities D EUR	<input type="checkbox"/>	5 years	21-10-2006	0,00	4,40	9,40	-1,03
European Equities D EUR	<input type="checkbox"/>	10 years	21-10-2006	0,00	6,00	4,00	3,29
Financials Equities D EU	<input checked="" type="checkbox"/>	YTD	21-10-2006	0,00	3,10	2,60	0,85
Food & Agri Equities D E	<input type="checkbox"/>	Since start	21-10-2006	0,00	-1,40	9,40	-0,46
Food & Agri Equities D E	<input type="checkbox"/>	Excess return 36m	21-10-2006	0,00	16,40	13,00	-2,09
North American Equities	<input checked="" type="checkbox"/>	Excess return 60m	21-10-2006	0,00	2,60	0,70	-1,26
North American Equities	<input type="checkbox"/>	Excess return bull 36m	21-10-2006	0,00	13,30	-4,30	1,17
Property Equities D EUR	<input type="checkbox"/>	Excess return bull 60m	21-10-2006	0,00	-0,50	-2,10	1,28
Property Equities D EUR	<input checked="" type="checkbox"/>	Excess return bear 36m	21-10-2006	0,00	4,20	2,50	0,48
Property Equities D EUR	<input checked="" type="checkbox"/>	Excess return bear 60m	21-10-2006	0,00			
Industrials Equities D EU	<input type="checkbox"/>						
Industrials Equities D EU	<input type="checkbox"/>						
Chinese Equities D EUR	<input type="checkbox"/>						
Chinese Equities D EUR	<input type="checkbox"/>						
Telecom Services Equiti	<input type="checkbox"/>						
Telecom Services Equiti	<input type="checkbox"/>						

OK

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Product Selector

30 of 59 products found

- [Show all products](#)
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Name

Code Bloomberg

Category

Registered in

Performance¹⁰⁰ 100

Period Month

Risk

Lessons learned

- Onderschat niet de impact van een nieuwe technologie
- Positief verrast over mogelijkheden van Flex
- Je ontwerpt een applicatie, geen website
- Waak voor loerende marketeers

Samenvattend ...

De rol van RIA in financiële informatievoorziening

Gebruik een RIA (Flex) voor *online klantinteractie* in *afgebakende onderdelen* van een website met *hoge eisen aan visualisatie en interactie*.

Vragen?



www.robeco.nl/professionals