

NEWS

For Immediate Release

Media Contact:

Jonny Swift

Impact Communications, Inc.

913-649-5009

JonnySwift@ImpactCommunications.org



Kwanti Earns High Customer Satisfaction Ratings in 2025 Advisor Software Survey from T3 Technology Tools for Today and Inside Information

Leading portfolio analytics solution named a Software All Star in Investment Data/Analytics and Stress-Testing Tools in preeminent wealthtech report

SAN FRANCISCO, CA (March 19, 2025) – [Kwanti](#), a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client retention, model management, and more, recently achieved high client satisfaction ratings across multiple categories in the [2025 T3 / Inside Information Software Survey](#) – including earning the highest rating in the Investment Data/Analytics Tools category for firms with more than 5% market share, as well as the highest rating in the Economic Analysis & Stress-Testing Tools category for firms with more than 3% market share.

The results of the annual technology survey and report, produced by [Joel Bruckenstein of T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#), were unveiled and presented live at the recent [T3 Technology Conference](#), which took place March 3rd – 6th in Dallas, Texas and saw over 1,000 total attendees. The survey is one of the most widely respected and referenced attempts to quantify what technology advisors are using, what they want to see more of, and which solutions they like best. Technology firms are ranked based solely on advisor input.

“We’re thrilled to once again achieve high ratings in this industry-leading survey and report, and to see our market share steadily increase” said **Christophe Gauthron**, Founder and CEO of Kwanti. “It’s incredibly rewarding to hear that advisors are highly satisfied with our platform and solutions – these results reinforce the positive feedback we consistently receive from clients.”

CONTINUING TO CRASH THE PARTY AND GAIN MARKET SHARE

The report dubbed client satisfaction ratings higher than 8.0 “remarkable” in its summary findings, noting that Kwanti has “made a tradition of living in the rarified 8.00 user ratings club”.

Kwanti received the highest client satisfaction rating (8.66) in the Investment Data/Analytics Tools category for firms with more than 5% market share, increasing from an 8.27 rating in 2024. In addition, their market share in the category jumped from 5.79% to 7.28%. The report noted that

Kwanti has “experienced most of the category’s market share gains over the past two years” and “continues to crash the party toward the top of the rankings.”

In addition, Kwanti scored the highest client satisfaction rating (8.55) in the Economic Analysis & Stress-Testing Tools category for firms with more than 3% market share, increasing from an 8.33 rating in 2024. Their market share also increased in this category, rising to 6.44% from 4.63%, with the report noting that “we can tentatively extrapolate further market share gains” for Kwanti.

Thanks to their outstanding ratings, the report dubbed Kwanti a “Software All Star” in both categories, recognizing solutions that finished in the top eight of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating. Only six other firms besides Kwanti qualified for the “Software All Star” list in multiple categories, among more than 300 programs featured in the report.

Kwanti was also named often in the ‘Programs Respondents Are Considering’ section within both these categories, and was even mentioned by users within the Portfolio Design Solutions category – with the report noting that “some advisors are using Kwanti to design portfolios” – as well as the Risk Tolerance Instruments category thanks to the firm’s newly introduced [Risk Profiling features](#).

“We consistently earn top marks year after year because our approach to development and innovation has always been advisor-first,” said Gauthron. “While many software providers claim to listen to advisor feedback, we actually follow through and implement the features they request. This commitment to turning advisor input into action is what truly sets us apart.”

To see the full T3 / Inside Information Software Survey results, with insights and analysis from **Bob Veres** and **Joel Bruckenstein**, [please click here](#).

COMBINING POWERFUL ANALYTICS AND PROPOSAL GENERATION TO OPTIMIZE TIME AND RESOURCES

Kwanti delivers portfolio analytics, investment performance data, stress testing, and proposals for advisors and investment professionals, assisting with prospect conversion, client acquisition and retention, and model management. The intuitive interface allows advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources.

Users can elegantly showcase portfolio recommendations to centrally position themselves in client relationships and close business with prospects, as well as leverage data integrations with leading custodians and portfolio management platforms to streamline the client management process. Kwanti enables advisors with talking points and puts data behind advisors’ recommendations, letting advisors see performance and allocation, risk factors, holdings that contribute to success, and opportunities to reimagine a portfolio. Advisors can ensure optimal investment choices and be prepared for all forms of risk with stress-tested decision making, as well as simulate how different trading strategies could have impacted returns in the past to inform decisions about managing portfolios into the future.

Over the past year, Kwanti has introduced multiple enhancements and new features to their industry-leading portfolio analytics platform, with the most impactful new features being the introduction of xPDF and Risk Profiling features.

- In September 2024, Kwanti announced a new set of [Risk Profiling](#) features designed to enhance the way advisors manage client risk, enabling advisors to send risk profiling questionnaires, compare client risk profiles with portfolio risk scores, and generate personalized investment policy statements.
- In November 2024, Kwanti introduced [xPDF](#), a document extraction feature that allows advisors to effortlessly upload PDF statements directly into Kwanti, which automatically extracts position details and creates a portfolio for efficient analysis, saving users countless hours.

One of the main reasons Kwanti has attended the T3 Conference for the last 10+ years is to interact and connect with their many integration partners, which include Pershing, Schwab, TD Ameritrade Institutional, Fidelity, Goldman Sachs, Betterment for Advisors, Altruist, Advyzon, Orion, Redtail, Black Diamond, WisdomTree, BlackRock, State Street, Riskalyze, TradePMR, Addepar, and more.

Kwanti offers a free 30-day trial, with no software to install and all features available during the trial. Financial advisors and other interested parties can [click here to sign up for the free trial](#) and see a video overview and demo of the platform.

ABOUT KWANTI

Founded by Christophe Gauthron, CFA®, and based in San Francisco, California, Kwanti is a portfolio analytics solution aiding financial advisors and investment managers with prospect conversion, client acquisition and retention, model management, and much more by delivering portfolio analytics, investment performance data, stress testing, and proposals. The intuitive, web-based interface allows investment advisors to balance serving clients well and managing portfolios with data-driven expertise by combining powerful analytics and proposal generation designed to optimize time and resources. To learn more about Kwanti, visit www.Kwanti.com.

###