

Partnership between TechRules and the client

TechRules provides BBVA Bancomer with the platform where participants can create, manage and analyze their portfolios. It includes simple and robust tools that are updated daily:

- **Simulator of management, analysis and portfolio monitoring**
- **Portfolio reporting and team page**
- **Funds analysis with the WatchList and T-Report™**



It also includes measurement tools that are integrated in the platform which allows each initiative responsible to monitor the progress and statistics of each of the competing teams.

It involves the communication and training areas of the client, which is the key to achieving success. The company provided the participants with web access to the platform where, besides the tools of analysis and portfolio management, it also had:

- **Training modules and tutorials**
- **Forum /Chat/ FAQ/ Investment rules**
- **Customer service to the participants**

BBVA Bancomer was responsible for the internal communication and management of the interactions with the teams. TechRules provides solutions to create and launch initiatives of these kind in very short periods of time. It is therefore, highly scalable and configurable to each entity.

Applications

This initiative of financial education can be targeted to different users profiles as well as

objectives, generating competitiveness between, for example:

Retail channels of the entity (Private banking, Retail banking, Corporate banking, etc.)

- ✓ **Universities**
- ✓ **Prospects and current clients of the organization**
- ✓ **Funds distributors**
- ✓ **Suppliers of the entity**

Useful and efficient tool to accompany specific campaigns for the launch of products and services.

Other products of the organization can be part of the potential investment universe as well as of the stock market or even organized competitions where prizes will be awarded for the best risk/return relation and not just profitability.