Title (en)
SYSTEM AND METHOD CONFIGURED FOR FACILITATING FINANCIAL ANALYSIS

Title (de)
SYSTEM UND VERFAHREN ZUR ERMÖGLICHUNG EINER FINANZANALYSE

Title (fr)
SYSTÈME ET PROCÉDÉ CONÇUS POUR FACILITER UNE ANALYSE FINANCIÈRE

Publication
EP 1984884 A4 20091014 (EN)

Application
EP 06735232 A 20060216

Priority
US 2006005475 W 20060216

Abstract (en)
[origin: WO2007106060A2] A method comprises determining a plurality of investment performance scores, determining a plurality of investment index performance scores and assessing each one of the investment performance scores dependent upon a respective one of the investment index. Each one of the investment performance scores corresponds to a respective investment of an investment portfolio. Each one of the investment index performance scores corresponds to a respective investment index. The respective investment index corresponds to a respective one of the investment performance scores. The method may comprise determining a collection of indices that each corresponds to a respective investment of the investment portfolio of the client, determining a composite investment index performance score dependent upon the indices, and assessing the investment portfolio dependent upon the composite investment index performance score.

IPC 8 full level
G06Q 40/00 (2006.01)

CPC (source: EP)
G06Q 40/06 (2013.01)

Citation (search report)
• No further relevant documents disclosed
• See references of WO 2007106060A2

Designated contracting state (EPC)
AT BE BG CH CY CZ DE DK EE ES FI FR GB GR HU IE IS IT LI LT LU LV MC NL PL PT RO SE SI SK TR

Designated extension state (EPC)
AL BA HR MK YU

DOCDB simple family (publication)
WO 2007106060 A2 20070920; **WO 2007106060 A3 20081009**; AU 2006340071 A1 20070920; AU 2006340071 B2 20110512; BR PI0621212 A2 20111206; CA 2640068 A1 20070920; CN 101379525 A 20090304; EP 1984884 A2 20081029; EP 1984884 A4 20091014; JP 2009527051 A 20090723; JP 5061127 B2 20121031; MX 2008010524 A 20081020

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US 2006005475 W 20060216; AU 2006340071 A 20060216; BR PI0621212 A 20060216; CA 2640068 A 20060216; CN 200680052908 A 20060216; EP 06735232 A 20060216; JP 2008555214 A 20060216; MX 2008010524 A 20060216