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Q3 2026

NEWSLETTER

PRODUCT & CLIENT UPDATE

Sharper risk analytics.
A new global partner.
A summer of great interns.

DEAR FINMASON CLIENT,

As we move through the back half of 2026, we wanted to share a few things we're proud of this quarter — a major FinPortal enhancement release, two new client launches now running on FinMason, and a look at the interns who spent their summer with us.

Across wealth, asset management, and insurance, the theme we keep hearing echoes what we said at the start of the year: analytics isn't a static reporting layer anymore — it's a core digital capability that shapes how firms grow, differentiate, and serve clients.

WHAT'S INSIDE

PAGE 02
FinPortal Gets Its Biggest Risk & Analytics Upgrade Yet
New risk scoring, fixed income depth, and scenario tools for our advisor community.

PAGE 03
Welcoming Two New Clients
A global wealth partner and an Asia Pacific retirement calculator — both running on FinMason.

PAGE 03
Our Product Lines, Side by Side
A closer look at FinRiver, FinCalc, and FinCore — our three product lines.

PAGE 04
Intern Spotlight
Connor Louden and Evan Munoz on their summer with FinMason, in their own words.

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FinPortal Gets Its Biggest Risk & Analytics Upgrade Yet

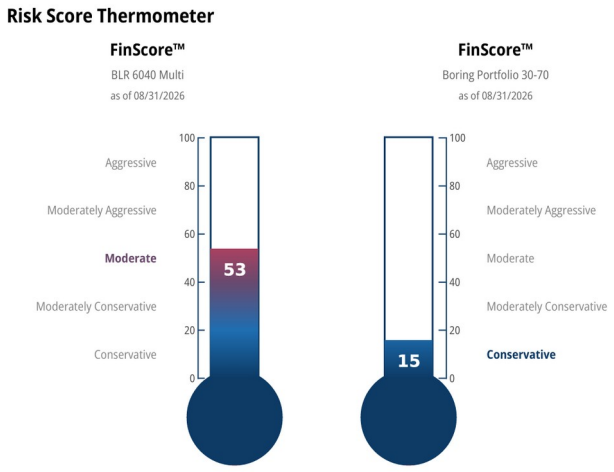
Major enhancement release now live for FinMason's advisor community

5,000+	0–100	3-way
ADVISORS USING FINMASON	FINSCORE™ RISK RATING SCALE	PORTFOLIO COMPARISON

FinMason is excited to announce a major enhancement release for FinPortal, deepening the platform's risk and portfolio analytics and giving advisors sharper tools to evaluate, compare, and communicate portfolio risk to their clients.

ENHANCED RISK SCORING

At the center of the update is an enhanced Risk Scoring experience, featuring a new Risk Score Thermometer that visualizes FinScore™ ratings (0–100) across risk categories from Conservative to Aggressive, alongside an expanded Risk and Return Statistics table covering standard deviation, Sharpe and Sortino ratios, alpha/beta versus the S&P 500, maximum drawdown, and up/down capture.



FIXED INCOME DATA ENRICHMENT

This release also brings significant fixed income data enrichment, extending coverage to individual bonds and proxy clustering, with new Credit Rating and Maturity Breakdown tiles that visualize allocation across the full ratings spectrum and maturity horizon.

SCENARIO ANALYSIS & REPORTING

Advisors gain additional scenario analysis and reporting through new Historical and Hypothetical Scenarios tiles, stress-testing portfolios against major market events and custom shocks like rate or currency moves. Rounding out the analytics are several new statistics:

- A dedicated Drawdown Analysis section with recovery-period tracking
- Correlation Analysis across 3- and 5-year windows
- Portfolio Component Risk/Reward analysis
- A Replacement Assets tool for identifying similar-exposure alternatives
- Refreshed exposure reporting across sector, country of risk, and asset allocation

HISTORICAL & ROLLING RISK/REWARD + TRIPLE PORTFOLIO COMPARISON

This release introduces Historical & Rolling Risk/Reward data with a configurable time-period selector (1, 3, 5, or 10 years) for tracking annualized returns and volatility over time, alongside expanded benchmarking capabilities. Advisors can now run a full Triple Portfolio Comparison — good vs. better vs. best, current vs. better vs. best, or current vs. proposed vs. benchmark — making it easier than ever to build a compelling, data-driven case for portfolio recommendations.

> ***"More data. More clarity. More confidence in every client conversation."***

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Q3 2026

Welcoming Two New Clients

NEW CLIENT — GLOBAL

FinMason is proud to welcome a global wealth management firm to our client community. The firm's platform gives its clients a complete, real-time view of their financial universe — enabling informed decisions, enhanced risk awareness, and portfolio optimization — with FinMason powering the calculation engine behind it.

NEW CLIENT — ASIA PACIFIC

FinMason has also launched with a new client in Asia Pacific, deploying an interactive, web-based retirement income calculator. The tool helps end users estimate how much income they may need in retirement, project the retirement savings required to support that income, and identify any potential shortfall based on current savings, contributions, and investment assumptions. It's designed as a simple, educational engagement experience rather than a detailed financial-planning exercise, and built to be adaptable across markets with limited localization.

Our Product Lines, Side by Side

Three ways FinMason shows up in your stack — from raw analytics infrastructure to purpose-built calculators to full asset-owner reporting.

API

FinRiver API

A modern, API-first analytics infrastructure for OCIOs, fund administrators, and institutional investors — embed institutional-grade portfolio analytics directly into your own platforms and workflows.

- Risk, performance & diagnostics via API
- Built for engineering & product teams
- Reduces internal build time

CALCULATOR

FinCalc

A full suite of annuity and insurance calculators supporting product design, illustration, and client-facing decision tools.

- Tax Deferral Calculator
- 1035 Annuity Exchange Calculator
- QLAC Optimization Calculator
- RILA Calculator

REPORTING

FinCore

Asset-owner reporting built for RIAs, wealth managers, and family offices — consolidated portfolio views, risk, performance, and diagnostics in one place.

- Consolidated client reporting
- Portfolio construction & risk tools
- Powers platforms like FinPortal

Intern Spotlight

Two of the students who spent their summer with FinMason — in their own words.

Connor Louden

Sales, Growth & Marketing Intern



A senior at the University of the Pacific (heading into an MBA next year), Connor studies Business & Analytics and plays NCAA Division I soccer. He brought the same discipline and drive he shows on the field to his work this summer.

PROUDEST PROJECT

Built a market research summary comparing FinMason to the competitive landscape across our verticals, starting from scratch — it was referenced on a live client call and circulated to the executive team within the same month.

ON EXPLAINING FINMASON TO A FRIEND

"It's the tech that sits behind the scenes at asset, wealth management and insurance firms, kind of like the engine under the hood of a car. The client never sees it, but it's what makes everything run smoothly."

ADVICE HE'S CARRYING FORWARD

"It's better to ask a 'dumb' question in a meeting than to guess wrong and redo the work later."

Evan Munoz

Analytics Team Intern



A senior at Lee Senior High School who plans to study Finance, Evan brought curiosity and a strong work ethic to the Analytics team this summer. Outside of work, he's often on the soccer field, the basketball court, or skateboarding.

PROUDEST PROJECT

Worked on a client data reconciliation project.

ON EXPLAINING FINMASON TO A FRIEND

"FinMason works behind the scenes with financial firms, like a trusted partner they can count on, building real relationships along the way."

ADVICE HE'S CARRYING FORWARD

"Grow with AI instead of working against it."

Thanks to Philip Taylor, CFA, who took the time to teach Evan how to work more efficiently in Excel and with AI tools.

Thank you, as always, for your continued trust in FinMason. We welcome your feedback and look forward to building together for the rest of the year.

Warm regards,
The FinMason Team