

Digitally Integrated Portfolio Management Platform

- Seven digitally integrated software modules, built upon a highly granular financial data foundation, providing deep portfolio management insights at high operational speed.
- Gain a high definition understanding of market and portfolio performance drivers, ultimately turning data quality into a competitive edge.
- Unified investment analytics platform that reconciles performance, risk, and research in one system. Zero silos. Zero friction.

Clarity.
Precision.
Speed.

Fundamental-Quantitative Investment Management Platform

Our Solution

quantisys.io is a cloud-based, end-to-end investment management platform that unifies fundamental and quantitative analysis across the full portfolio lifecycle.

Built for clarity, precision, and speed, it systematically processes and reconciles large-scale market, company, and portfolio data, delivering a rigorous, independent analytical foundation that removes noise, sharpens decision-making, and exposes tomorrow's winners.

Our Goal

Give asset managers a measurable, structural competitive edge in investment opportunity discovery and business development.

Target Market

B2FI, B2B, B2C, Financial institutions, asset managers, family offices, investment advisors, consultants. North America and Europe.

Business Model

Subscription
Licensing / Partnership

Year Founded

2020

Fintech Vertical

Wealth Tech

Website

quantisys.io

Contact

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Team Members



Benoît Murphy, M.Sc., CFA, FRM
Founder, President, Chief Financial Economist

20+ years of institutional investment experience at an \$18B Canadian pension fund

Benoît is an economist, CFA and FRM charterholder, and President and Chief Financial Economist of Quantisys Inc. With an M.Sc. in Economics and extensive experience in institutional investment management, banking, and consulting, he combines academic rigor with practical financial expertise. He has held leadership roles in asset allocation and fixed income at a major corporate pension fund, where he also developed advanced information processing systems for macroeconomic analysis, portfolio management, and performance attribution. Today, he is building an integrated fundamental-quantitative analytics platform designed to deliver clear, precise, and high-quality insights for improved portfolio management and capital allocation decisions.



Stéphane Huot, MFA
Co-founder, Chief Brand Officer

25+ years of experience in corporate and financial communication design

Stéphane is a senior branding consultant and graphic designer with 30 years of experience in corporate and financial communication. A graduate of the Rhode Island School of Design (M.F.A., Design Award of Excellence), he began his career at Gottschalk+Ash International in Montréal, where he created visual identities and annual reports for major international corporations. He has led branding and communication projects for clients such as Investissement Québec, Montréal International, PME Montréal, as well as numerous public and private corporations. His work, recognized internationally with awards and exhibitions, combines strategic insight with refined visual design. Stéphane also teaches design at UQAM's School of Design, where he has been a lecturer since 1997.

Return and Risk Decomposition by Asset, by Market, and by Fundamentals at All Stages of a Full Portfolio Management Cycle



What We Built

With the goal of making the investment process simple, efficient, and insightful, we built Quantisys.io

quantisys.io is a cloud-based, end-to-end investment management platform that unifies fundamental and quantitative analysis across the full portfolio lifecycle. Built for clarity, precision, and speed, it systematically processes and reconciles large-scale market, company, and portfolio data, delivering a rigorous, independent analytical foundation that removes noise, sharpens decision-making, and exposes tomorrow's winners.

Our daily processed database covers 1,500 of the largest U.S.-traded companies and 500 ETFs. Everything is hosted in the cloud on quantisys.io. Anonymized inputs can be entered manually or uploaded via files. Outputs, including downloadable Excel links, are delivered by email. All inputs and outputs are subsequently deleted.

Our Innovation

Understand what drives equity price returns and risk from both fundamental and quantitative perspectives.

We built a unified fundamental-quantitative framework to explain equity price returns with precision. It can be applied to both research and portfolio performance measurement at high operational speed. It brings clarity across the entire organization.

Fundamental Model

We break each stock's return into two main drivers: changes in valuation (P/E) and changes in earnings (EPS). EPS growth measures the contribution of the company's fundamentals.

We then go deeper into EPS by applying a DuPont-style breakdown. This lets us measure how much each underlying factor contributes to returns, such as buybacks, net income, profit margins, sales, return on equity, leverage, and book value, on a daily basis.

For each of these factors, every company is assigned a quintile score. This ranks the company relative to the investment universe, making it easy to identify whether it is among the strongest or weakest performers on each dimension.

Quantitative Model

We break each stock's return and risk into two parts: what comes from overall market exposure (beta) and what comes from company-specific performance (selection).

This clearly separates market-driven returns from company-specific drivers. Each component is then converted into a quintile score, ranking every company against the full investment universe and making it easy to identify leaders and laggards on each dimension.

Application to Equity Market Research

Both models provide independent, complementary views of the same returns and risks. The system becomes particularly powerful when both lenses are combined to build shortlists of stocks based on shared quintile characteristics for further analysis.

For example, the framework can identify strong fundamental performers whose price action lags their beta-adjusted returns. This may highlight faster-growing companies trading at temporarily discounted prices.

It can also identify companies with superior and accelerating fundamentals that are already recognized by the market, as reflected in price growth exceeding beta-adjusted returns. This may help identify tomorrow's giants driving robust long-term portfolio growth.

Other applications, using different sets of quintilized metrics, may generate additional insightful shortlists, including on a risk-adjusted basis.

Application to Portfolio Performance and Risk Measurement

These two models can also be applied to portfolio performance and risk diagnostics. Since portfolios are collections of stocks, and we have daily, granular return metrics for each stock, we can build portfolio return measurement from the ground up. The result reconciles exactly with the traditional Modified Dietz formula, but with far greater explanatory detail.

The performance team can show which portion of returns comes from fundamental improvements, P/E expansion, beta-driven effects, and non-systematic factors. No time is lost reconciling the sources of returns or risks.

Decision-Making Improvements

Return traceability adds value over time

Because portfolio performance and risk are explained using the same Fundamental and Quantitative Model metrics applied during stock research, and because this information becomes available more quickly as returns are instantly reconciled to their underlying drivers, decision-makers have more time to absorb clearer, more refined feedback based on the same lens used in the initial selection process.

This gives managers the opportunity to make more informed decisions or to deepen their understanding of the portfolio's behavior.

Organizational Impacts

More efficient information processing

The use of quantisys.io improves research efficiency, enables more granular performance analysis, and gives decision-makers clear visibility to confirm outcomes and act on insights that were not previously available.

Use Cases

Built for all investment teams, family offices, consultants.
Highest impact for lean teams/consultants competing with larger, better-resourced firms.

How Your Firm Can Benefit?

Save Time: Increase Productivity by Using One Unified Framework Across the Full Investment Management Cycle

- Scan markets faster with a consistent, objective methodology
- Identify opportunities quickly and build stronger investment theses
- Diagnose portfolios with higher-definition return metrics than industry standards
- Accelerate feedback loops between decisions and outcomes
- Eliminate reconciliation friction across teams
- Create a common return and attribution language firmwide
- Improve speed and clarity of client reporting

Make More Money: Lower Management Cost per Portfolio

- Scale portfolios without increasing headcount
- Accelerate the completion of regulatory documentation tasks
- Grow assets under management
- Reinvest time savings into deeper, faster opportunity discovery
- Improve long-term flagship portfolio performance
- Strengthen client and prospect communications and business development outcome

How Your Firm Can Benefit From Using quantisys.io

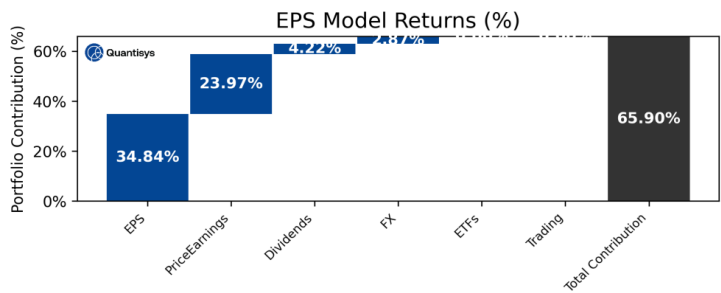
Practical Portfolio Return Attribution Diagnostic Example:

A Portfolio Containing 12 Stocks Returned +65.90% Over a Year. Why?

1. The Portfolio Returned

+65.90% during the past year. Of this, multiple expansion contributed +23.97% and EPS growth contributed +34.84%.

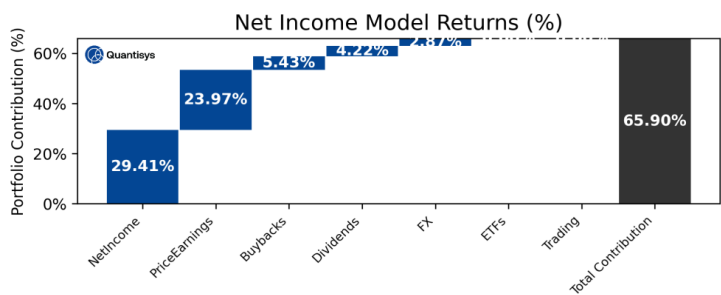
Can we understand the +34.84% EPS growth contribution better?



2. The EPS Growth

can be split in +5.43% contribution from share buybacks and +29.41% contribution from Net Income expansion.

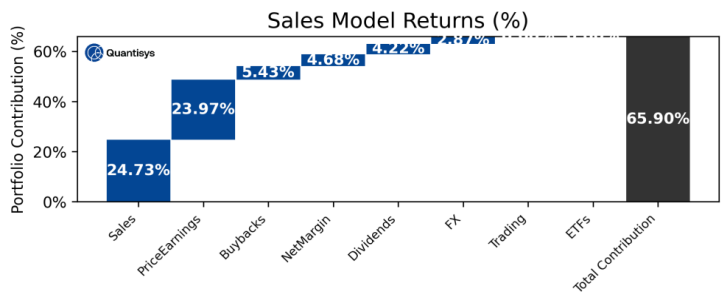
Can we understand the +29.41% Net Income growth contribution better?



3. The Net Income Growth

can be split in +4.68% contribution from net margin expansion and +24.73% contribution from sales expansion.

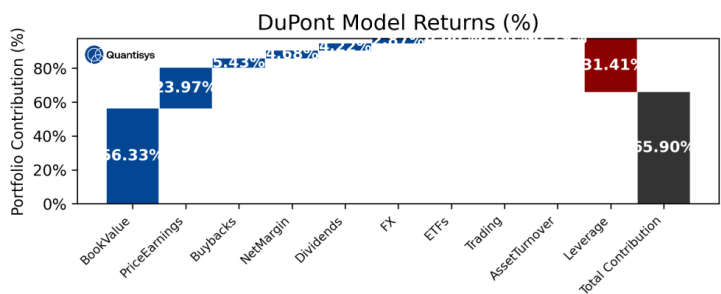
Can we understand the +24.73% Sales growth contribution better?



4. The Sales Growth

can be split in a negative -1.92% contribution from asset turnover, a negative -31.41% contribution from leverage and +56.33% contribution from book value expansion.

Can we understand how much each stock contributed in each of those areas?



5. Our Proprietary DuPont Portfolio Return Attribution Table

shows that BookValue expansion contributed +56.33% to the portfolio return, of which the most important stock contributor is Stock 12 with a +30.8% contribution.

Ticker	FX	Dividends	PriceEarnings	Buybacks	NetMargin	AssetTurnover	Leverage	BookValue	ETFs	Trading	Total Contribution
Stock 1	0.257%	0.890%	2.461%	1.623%	8.361%	2.962%	1.051%	1.227%	0.000%	0.000%	18.831%
Stock 2	0.308%	0.392%	11.417%	1.119%	-2.020%	-1.923%	-0.038%	1.527%	0.000%	0.000%	10.782%
Stock 3	0.180%	0.183%	3.770%	0.544%	0.253%	0.238%	-0.048%	1.573%	0.000%	0.000%	6.694%
Stock 4	0.121%	0.317%	3.654%	0.480%	0.357%	-0.642%	0.735%	0.840%	0.000%	0.000%	5.863%
Stock 5	0.097%	0.003%	-0.499%	0.040%	0.095%	0.624%	-0.655%	5.065%	0.000%	0.000%	4.770%
Stock 6	0.427%	0.226%	-0.128%	0.003%	-0.235%	-0.957%	-1.783%	7.158%	0.000%	0.000%	4.712%
Stock 7	0.173%	0.160%	1.552%	0.663%	-1.154%	0.956%	1.839%	-0.545%	0.000%	0.000%	3.644%
Stock 8	0.200%	0.070%	1.600%	0.370%	0.420%	0.477%	-0.212%	0.494%	0.000%	0.000%	3.419%
Stock 9	0.194%	0.646%	-1.228%	-0.058%	0.111%	3.410%	-6.461%	5.763%	0.000%	0.000%	2.377%
Stock 10	0.196%	0.487%	0.811%	0.205%	-0.274%	-0.797%	1.138%	0.000%	0.000%	0.000%	1.765%
Stock 11	0.314%	0.211%	-0.068%	0.370%	0.562%	-1.683%	-0.590%	2.430%	0.000%	0.000%	1.546%
Stock 12	0.401%	0.634%	0.622%	0.074%	-1.791%	-2.858%	-26.384%	30.795%	0.000%	0.000%	1.493%
Total Contribution	2.868%	4.218%	23.966%	5.433%	4.683%	-0.192%	-31.408%	56.326%	0.000%	0.000%	65.895%

Proprietary DuPont Return Attribution Table Unique AI Insights:

Portfolio Diagnostics

The portfolio's +65.9% return is heavily flattered by non-operational drivers. BookValue (+56.3%) and Price Earnings expansion (+24.0%) account for nearly all gains, while operational fundamentals (NetMargin +4.7%, AssetTurnover -0.2%) contributed roughly +4.5% combined. Stock 12 distorts the BookValue line: its +30.8% gain is offset by a -26.4% Leverage drag, suggesting a balance sheet event, not organic compounding. Multiple expansion on Stocks 1, 2, 3, and 4 (~21% combined) is likely mean-reverting and borrows from future returns. Concentration is high — the top five names produced ~47% of contribution.

Forward-Looking Study Recommendations

Before next year, we will investigate four things. First, confirm what drove Stock 12's BookValue/Leverage swing and re-evaluate the position against its true net contribution (~+4.4%). Second, stress-test Stocks 1, 2, 3, and 4 assuming flat multiples next year — these are the clearest candidates for trimming to lock in re-rating gains. Third, separate operationally strong names (Stocks 1, 5, 6) from pure re-rating beneficiaries; they merit different treatment. Fourth, examine names with negative operating contributions (Stocks 2, 7, 11, 12) to determine whether deterioration is cyclical or structural. Finally, review whether current concentration reflects conviction or price drift.

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