



# Press release

Brussels, 23 October 2014

## The Bolero strategy is working

# Bolero launches an innovative and fully revamped investment platform

Today, Bolero, the online investment platform for private investor clients of KBC Securities, presents its new transaction platform. The new platform, which has come about following extensive investor surveys, uniquely combines powerful investment tools and extensive stock market information.

Bolero's redesign was started on something more than a year ago. The cost structure has been revisited, the Bolero app for iPhone launched, and the products and services on offer to retail clients further optimised. Today, Bolero launches a brand new, user friendly stock trading platform where investors can invest with insight.

Before starting to develop the new platform, Bolero asked its clients what it was they are looking for. From a survey of 1 200 Bolero clients and a host of face-to-face interviews with investors came the distinct message that what investors expect from an online broker is a user-friendly platform with a transparent cost structure. In the second place online investors want the right amount of information at the right time, matched to their investor level and easy to find in a central location.

Bolero has created a very easy-to-navigate, simply structured platform (<https://platform.bolero.be>) centred around the client's portfolio. Clients can monitor **the evolution in the value of their portfolio** via an interactive graph (with data going back to when they first became a Bolero client). Another, unique, feature is **the calculation of return**: clients see not only the return on individual positions but also the return across their entire portfolio, and they can even compare it to the return on the Bel 20 or some other index. Bolero's inspiration for these features came from US brokers, whose online brokerage clients already enjoy the benefit of these kinds of portfolio tools and information.

## Information is our trump card

The new transaction platform offers stock market information for both beginners and more experienced investors. For each security (whether shares, trackers, bonds, etc.), a very extensive dashboard is available in the **Hotspot**. In the case of shares, beginner investors can use it to get to grips with general information such as **price data, graphs, analysts' recommendations**, and so on. Experienced and more active investors can zoom in deeper on **financial ratios, and fundamental and technical analyses**. And for US shares, they

can find out how many short positions there are or how many transactions the company's management themselves are putting through. They can immediately see if turbos or options are available for a share.

On top of that, clients are directly fed **an extensive range of stock market analyses**, analysts' reports and market information. If clients are looking for a given security, they can immediately see whether an analysis of that security is available in our information repository. Clients can use a host of **shortlists and share screeners to spot potential stock market opportunities**, for which Bolero has even teamed up with Recognia, an American authority in the field of fundamental and technical analyses.

The website is **fully responsive** and therefore adapts automatically to whatever device clients use (smartphone, tablet, etc.). This means that Android users can also use Bolero. At the same time as launching the new stock trading platform, within the next few weeks Bolero will be launching **an app for iPad, which will be the most comprehensive stock trading app on the Belgian market.**

During 2014, Bolero also started up **the Bolero Academy**, from which each and every investor, from beginner to the more experienced, can acquire knowledge about the stock market and investing. With its resources in the form of, for instance, white papers, short videos and longer tutorials, Bolero allows clients to gain deeper insight into the stock market. A further mainstay of Bolero's financial education offering is its daily newsletters 'Beurs bij 't Ontbijt/bij de Lunch' (Stock Exchange at Breakfast/Lunchtime), plus company visits and events at which Bolero clients can get to know and put questions to the CEOs and CFOs of listed corporations.

## **New initiatives a big success**

Earlier this year, Bolero also launched its iPhone app. Meanwhile, we're already seeing that 25% of logins from Bolero clients come in via the app and no fewer than 5% of orders are placed using it. That is comparable to the figures among brokers on the US market. Bolero clients who actively use iPhones additionally log in twice as often as other clients and carry out 60% more transactions than the 'average' Bolero client.

The fact that custody fees were done away with in October 2013 has not gone unnoticed. Bolero saw the number of clients double over a year and a half, with its AUM rising by 60%.

Bolero also recently extended its range of products and services specifically aimed at common KBC and Bolero's private clients: clients in relationship management at KBC can choose the 'Share Service', with which they also get advice via their KBC branch for the positions they hold at Bolero. This is a unique collaboration in Belgium between an online broker and a bank, offering clients the best of both and giving them a comprehensive view over all their securities.

*Bart Vanhaeren, General Manager of Bolero: 'Bolero clients can build on the expertise and renown of a true brokerage firm and the service it offers to institutional investors. The new platform and the recent strategic choices are aimed at making Bolero the reference online broker on the Belgian market, with the best platform and the best information and service for its clients, and all at a fair price'.*

Learn more about the new platform and see the demo video as of 27 October on [www.bolero.be](http://www.bolero.be). The Bolero app for iPad will be available in the App Store as from mid-November.

## About Bolero

Bolero is the online stock market platform of KBC group subsidiary, KBC Securities, Belgium's largest stockbrokers. Since 1999, Bolero has been offering inexpensive solutions to private investors who want to manage their own portfolios online. Bolero clients have direct access to over 20 markets, including the Western and Eastern European<sup>1</sup>, US and Canadian markets. They can trade in a broad range of listed products (shares, bonds, trackers, turbos and so on). Bolero does not provide personal advice, but instead supports clients by offering them the widest range of information and training schemes. For instance, Bolero clients are given access to all studies conducted by and reports drawn up by the KBC Securities team of analysts, including Beurs bij 't Ontbijt (Stock Exchange at Breakfast), a daily Dutch-language newsletter with comprehensive market information and analyses. The many dozens of events and training courses organised by Bolero help clients become even more familiar with all aspects of the stock market.

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<sup>1</sup> Euronext (Brussels, Amsterdam, Paris and Lisbon), Equiduct, all US exchanges (NYSE, Nasdaq, Amex), Toronto, Milan, Madrid, London, Stockholm, Zurich, Vienna, Warsaw, Frankfurt, Helsinki, Oslo, Copenhagen, Budapest, Slovakia and Slovenia.