

VEKTOR
BY
INVESTPUPPY

WHY NOT THE INCUMBENTS?

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A fair assessment of every serious alternative to Vektor. What each one does well, where it falls short for boutique wealth teams, and what Vektor does differently. We have not written.

For DPMs, family office principals, and prospective partners

THE ALTERNATIVES

We know these platforms from the inside.

The assessments that follow are not guesses. They are the observations of practitioners who worked with these tools in professional contexts before deciding to build an alternative. The honest notes are honest because we know where they are right.

Bloomberg PORT

Professional portfolio analytics. Enterprise pricing.

if you manage >\$500M AUM with a dedicated quant team, Bloomberg PORT is probably the right answer. Vektor is not targeting that segment.

WHAT THEY DO WELL	THE LIMITATION	THE VEKTOR ANSWER
The most comprehensive portfolio analytics platform available. Risk decomposition, factor attribution, stress testing, compliance monitoring, and full integration with Bloomberg data. The institutional standard for a reason.	Built for institutional teams with institutional budgets. Terminal costs start at ~\$31,980 per seat per year before PORT licensing. Implementation requires dedicated quant resource to configure and maintain. The output quality is proportional to the expertise of the person operating it. For boutique teams, the cost per AUM managed is prohibitive and the operational overhead is unsustainable without dedicated support.	Vektor delivers the systematic output — efficient frontier, signal selection, max-Sharpe allocation — at a price point accessible to boutique teams, without requiring a dedicated quant to operate it. Not a replacement for Bloomberg at institutional scale. A viable alternative for teams currently priced out of the category.

FactSet

Research management and portfolio analytics. Mid-market positioning.

WHAT THEY DO WELL

Strong research management workflow, solid portfolio analytics, and better value than Bloomberg for teams that do not need the full Bloomberg data universe. Well-established in the mid-market. Good compliance and reporting infrastructure. Comprehensive front-to-back platform covering portfolio management, risk, compliance, and operations. Strong multi-asset support. Used by pension funds, sovereign wealth funds, and large insurance companies globally. Integrated investment management platform for large asset managers and asset owners. SimCorp Dimension Industry-standard order management system for institutional asset managers. Strong compliance and pre-trade checking. Deep integration with prime brokers and custodians. Genuinely useful for large multi-asset institutional desks. Order management and compliance for institutional buy-side. Enterprise-grade, enterprise-priced. Charles River Development (CRD)

THE LIMITATION

Pricing remains out of reach for most independent boutique teams. The systematic portfolio construction workflow — signal selection, optimisation, automated allocation — requires significant configuration and quant resource to implement properly. FactSet provides the infrastructure; the methodology is yours to build. SimCorp is built for organisations with dedicated implementation teams, multi-year onboarding timelines, and ongoing technical resource. The boutique DPM or independent manager looking to systematise listed equity management is not SimCorp's target customer — and would be significantly over-served and over-charged by it. Designed for institutional scale — minimum deployments typically require a dedicated operations team and multi-year implementation. Pricing and integration complexity place it firmly outside the boutique and independent manager segment. The systematic portfolio construction workflow Vektor provides is not the core use case.

THE VEKTOR ANSWER

Vektor provides the methodology as well as the infrastructure. The signal selection, the optimisation, and the allocation logic are built in and documented across ten research papers. The boutique team gets a systematic output from day one, not a platform they need to fill with their own quant capability. Vektor provides the systematic listed equity portfolio management workflow that boutique and independent managers actually need, without the implementation complexity and cost base of an enterprise platform designed for institutions ten times the size. Vektor is not an order management system and does not compete with CRD at institutional scale. For boutique DPMs and independent managers who need systematic listed equity portfolio management — not institutional-grade OMS infrastructure — Vektor is the right tool for the right team.

Excel + Manual Process

The current reality for most boutique teams. Zero licence cost.

if your current Excel process is working and your AUM is small, the cost-benefit may not yet favour a systematic platform. The proof-of-concept offer exists precisely to answer this question on your own data.

WHAT THEY DO WELL

Free. Infinitely flexible. Already in place. Every wealth professional knows it. No procurement process, no implementation project, no new vendor relationship.

THE LIMITATION

Not systematic. Not reproducible. Not scalable. Signal selection is implicit and undocumented. Portfolio construction is not optimised across the efficient frontier. Capital allocation is manual and subject to rounding error. There is no audit trail that would survive a compliance review. And it does not get better with more AUM — it gets worse. An Excel model is as durable as the person who maintains it.

THE VEKTOR ANSWER

Vektor replaces the manual process with a systematic one. The output is fully auditable, the methodology is documented, the signal selection is optimised per instrument, and capital allocation is 98.94% efficient at live prices (SGX reference mandate, 100-share board lots; single-share lot markets consistently exceed 99.94%) prices. The time saving compounds with every additional mandate.

Robo-Advisory Platforms

Automated retail investment. Low cost. Consumer positioning.

WHAT THEY DO WELL

Genuinely low cost, highly accessible, and suitable for straightforward retail accumulation mandates. Good client-facing interfaces and regulatory compliance for the retail segment they serve.

THE LIMITATION

Not designed for professional mandate management. The investment logic is standardised — one methodology applied to all clients. There is no per-instrument signal optimisation, no efficient frontier mapping to your specific universe, no mandate-specific customisation, and no compliance infrastructure for professional DPM operations. The DPM who uses a retail robo-tool for client mandates faces an unresolvable credibility gap at any serious due diligence.

THE VEKTOR ANSWER

Vektor is built for professional mandate management, not retail accumulation. Different client, different mandate, different signal selection, different allocation — concurrent and independent. The compliance infrastructure, the audit trail, and the methodology documentation are designed for professional scrutiny.

Build It In-House

Custom systematic platform. Full control. Significant investment.

a well-resourced in-house build with the right quant talent will eventually produce a better fit for your specific requirements than any external platform. The question is whether the economics and the timeline are viable for your team at this stage.

WHAT THEY DO WELL

Perfect fit with your specific requirements. No vendor dependency. Proprietary methodology that cannot be replicated. Full control over roadmap and evolution.

THE LIMITATION

A serious in-house systematic platform requires a senior quant developer, 12–18 months of build time, ongoing maintenance, and a significant capital commitment before a single client mandate is managed. The methodology decisions embedded by practitioners who have managed portfolios at this level are not easily replicated from scratch. Most boutique teams that have attempted this have found that the ongoing cost of maintenance exceeds the cost of a purpose-built platform.

THE VEKTOR ANSWER

Vektor is the result of that build. The methodology is documented. The infrastructure is live. The Proof Partners programme gives you the economics of a custom build without the construction timeline or the ongoing maintenance overhead. If you want to build in-house anyway, the white paper series describes the methodology in full.

Show us a mandate. We'll show you whether Vektor is the right answer for yours.