

How Passiv Empowers Investors to Gain Valuable Insights Into Past Portfolio Performance



Passiv was born when its founders met and discovered they were both disillusioned with the status quo of investing: paying high fees for active management of investment products, with little to show for it. Passiv is a portfolio management tool that makes it easier for DIY investors to invest and rebalance their portfolios using Passiv's intuitive experience, designed to keep you organized and make good investment decisions with your wealth. It eliminates the need to use spreadsheets, saves you from having to log into your broker to place trades, and helps you stick to your portfolio's target allocation. With Passiv, users can be their household's wealth manager.

This historical portfolio performance tracking capability that we offer, thanks to Barchart, serves as a powerful tool for investors to assess the success of their investment strategies and adjust their portfolios accordingly," said Brendan Wood, Co-Founder of Passiv. "By delivering Barchart's End-of-day historical data, we enable investors to make data-driven decisions and gain valuable insights into their portfolio performance," added Wood

THE PROBLEM

To fulfill their mission of making passive investing simple for everyday investors who want to save money and time, Passiv was in search of a market data provider to supply them with the reliable historical data they needed to power their platform. This data would also help them track historical portfolio performance internally for Passiv automated portfolios.

THE SOLUTION

Passiv found that Barchart would be able to provide them with all of the historical data they required to be more organized and in control of their investment experience. By leveraging Barchart's getHistory API, Passiv is able to effectively track and analyze the historical performance of each portfolio.

By utilizing this data, Passiv empowers investors to gain valuable insights into past portfolio performance, allowing them to make confident decisions for the future. The integration of Barchart's data enables Passiv to provide users with a comprehensive view of the markets, illustrating the fluctuations and trends in investment returns over time.

"Our users want the clearest picture of their portfolio - which makes historical portfolio performance tracking crucial to their experience. Thanks to Barchart, we can offer them the tools they need to assess the success of their investment strategies and adjust their portfolios accordingly," said Brendan Wood, Co-Founder of Passiv. "By delivering Barchart's end-of-day historical data, we enable investors to make data-driven decisions and gain valuable insights into their portfolio performance," added Wood.

"We understand the importance of accurate and timely information in the world of investing, and our partnership with Passiv allows us to support their mission of empowering investors," said Mark Wator, Head of Sales at Barchart. "It's truly rewarding to be a part of Passiv's journey in revolutionizing portfolio management, and we look forward to continuing our collaboration to enhance the investment experience for their users," added Wator.

With an arsenal of historical data on their side, Passiv is well-equipped to deliver accurate and timely market data, enabling investors to navigate the complexities of the financial markets with confidence. To learn more about Passiv, please visit www.passiv.com.



Barchart is a leading provider of market data and services to the global financial, media, and commodity industries. Our diversified client base trusts Barchart's innovative Solutions across data, software, and technology to power their operation from front to back office, while our Media brands enable financial and commodity professionals to make decisions through web content, news, and publications.