



MAKE SENSE OF YOUR WEALTH

IN PARTNERSHIP WITH CREDIT SUISSE

Canopy is an anonymous financial data aggregation and insights platform for high net-worth individuals. Canopy provides a complete and accurate picture of your entire wealth, and helps you gain the insights needed to make better investment decisions.



CREDIT SUISSE
DATA FEED



SIMPLE
AND EASY



COMPLETE
AND ACCURATE

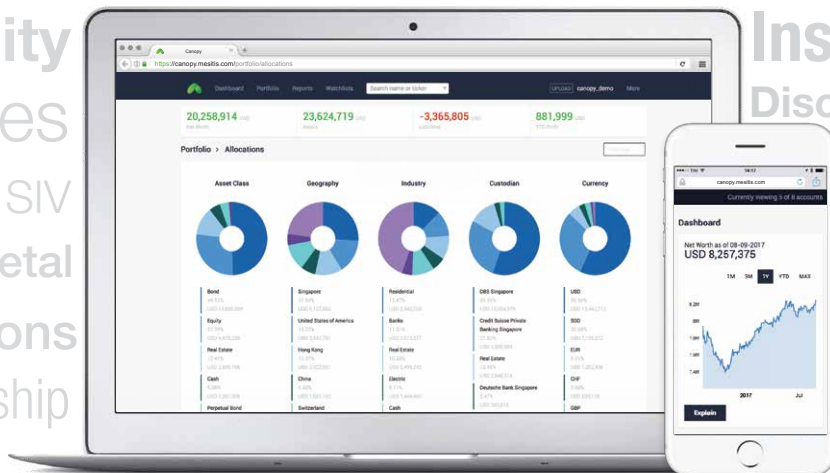


SAFE AND
SECURE



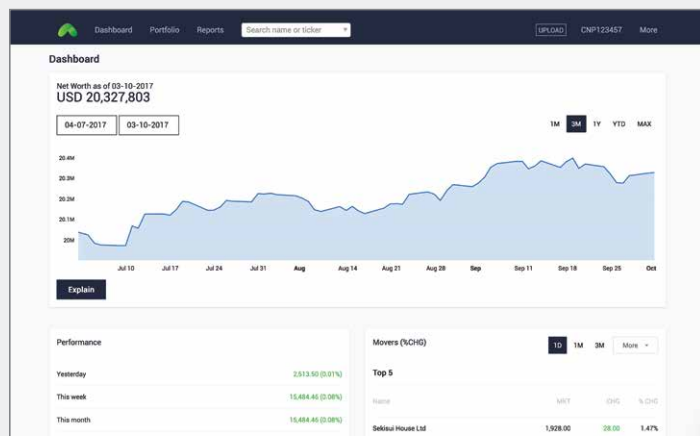
INTUITIVE AND
INSIGHTFUL

Stocks Trusts **All Private Bank Accounts** ETF Real Estate
Private Equity Insurance FX Forwards
Commodities Discretionary Accounts
REIT **Loans** SIV Structured Products
Wine Precious Metal **Mutual Funds** Gold
Bonds Options Brokerage Accounts
Fractional Ownership **Derivatives** Art
of Accounts Hedge Funds
Direct Investment Commercial Real Estate **Venture Capital**



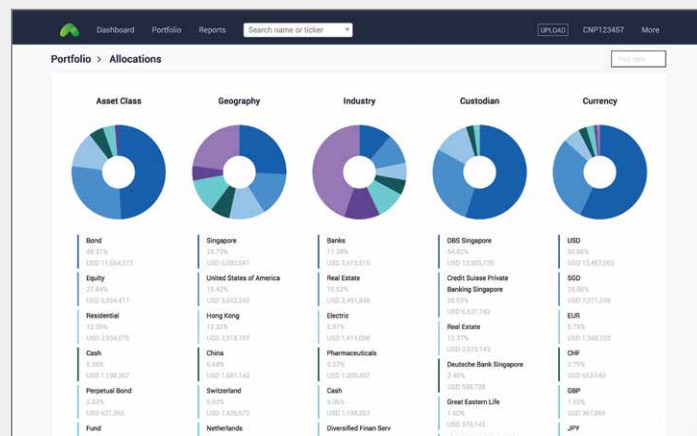
Dashboard

Obtain a quick overview of the changes in your net worth. Identify the top and bottom portfolio movers and market performance.



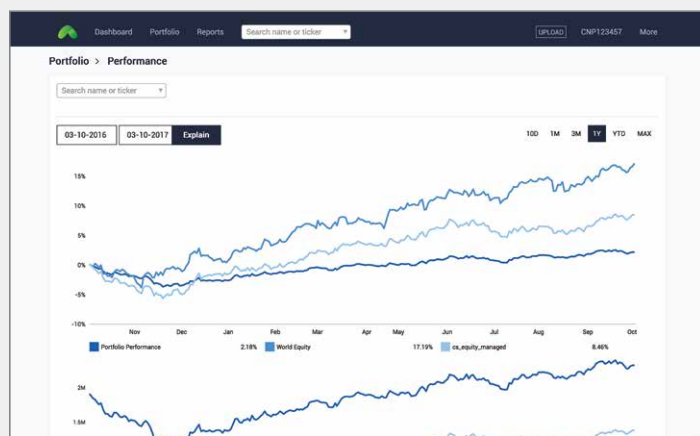
Asset Allocation

View your aggregated portfolio by asset class, geography, industry, custodian and currency.



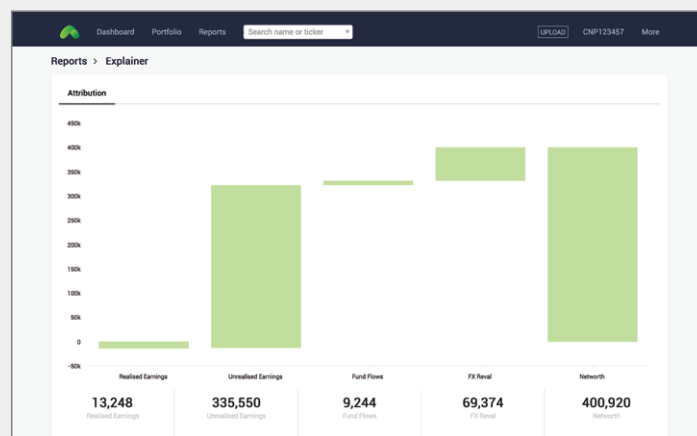
Performance Benchmarking

Compare your portfolio performance against benchmarks or between your individual accounts.



Performance Attribution

Breakdown your performance into realized and unrealized earnings and understand fund flow FX revaluation.



Credit Suisse Data Feed

Sign up through Credit Suisse to take advantage of a dedicated daily data feed. This enables your Credit Suisse accounts to be automatically kept up-to-date.

For non-Credit Suisse data, simply anonymize and send Canopy your electronic information - all formats are accepted!

Complete Solution

Canopy handles all types of financial and non-financial assets, including equity, bonds, mutual funds, ETFs, loans, derivatives, private equity, hedge funds, real estate, art and many more.

Access your aggregated portfolio via the web visualizer, generate reports in Powerpoint, and download your data in Excel!

Sign up via your:
Credit Suisse Relationship Manager

Learn more at:
<https://canopy.cloud>