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# S&P TEST

SWOT & PESTLE.com

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## WEALTHSIMPLE INC. SWOT & PESTLE ANALYSIS

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**Company Name :** Wealthsimple Inc.

**Company Sector :** Financial Services

**Operating Geography :** Canada, North America, Global

**About the Company :** Wealthsimple Inc. is a millennial-focused online financial management business headquartered in Toronto, Canada. Katchen created a spreadsheet with ideas to help his colleagues set up investment portfolios in 2012, the spreadsheet's popularity aided in the development of Wealthsimple and he returned to Toronto in 2014 to launch his business. Wealthsimple is a Robo-advisor that also offers live adviser support. Each client is assigned an investment advisor who assists them in selecting investments that are appropriate for their long-term objectives and risk tolerance. The firm does not have a physical location; instead, advisors can be reached by phone, text message, email, or video chat. No account minimum is required, and there is no transaction fee. An annual fee of 0.4 per cent to 0.5 per cent is payable, depending on the size of the account. Wealthsimple currently has a crypto platform that allows users to exchange cryptocurrencies (BTC and ETH). The same web portal is used for this service as it is for the Trade service. This service, like Trade, has no fees. Wealthsimple Trade announced on July 8, 2021, that fractional shares would be accessible online.

Wealthsimple Inc.'s Unique Selling Point or USP is that it is creating the world's most human financial company with powerful financial tools to assist clients to grow and manage their money. The mission statement of Wealthsimple reads, "Our mission is to help everyone achieve financial freedom, no matter who they are or how much they have. We're reimagining what it means to manage your money by making simple, smart and affordable financial products for everyone".

**Revenue :**

\$77 million - FY20 (estimated)

Company is privately held.

**SWOT Analysis :**

The SWOT Analysis for Wealthsimple Inc. is given below:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>1.High finance raising capability</li> <li>2.One of the fastest growing technology-based investment firm</li> <li>3.Unique strategy of slow wealth growth</li> <li>4.Convenient global investment capability to customers</li> </ul>	<ul style="list-style-type: none"> <li>1.Minimal presence outside few countries</li> <li>2.Lack of complicated products like option trading</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>1.High growth possibility in platform users due to pandemic</li> <li>2.Growing tendency of avoiding advisors</li> <li>3.Accelerated addition of subscribers due to recent retail trading popularity</li> <li>4.Bitcoin rally can help the new Crypto platform</li> </ul>	<ul style="list-style-type: none"> <li>1.High competition to operations in USA</li> <li>2.Cybersecurity threat to the investment data</li> <li>3.Investors breaking regulations with use of retail trading platforms</li> </ul>

## PESTLE Analysis :

The PESTLE Analysis for Wealthsimple Inc. is given below:

<p style="text-align: center;"><b>Political</b></p> <p>1. Brexit will affect delegation capability of wealth managers</p> <p>2. US relief package increases trade volumes</p>	<p style="text-align: center;"><b>Economical</b></p> <p>1. Low asset prices caused by low growth led to higher participation</p> <p>2. Revised economic forecasts led to increased investor interest</p>
<p style="text-align: center;"><b>Social</b></p> <p>1. Young investors showing high interest in trading apps</p> <p>2. Higher financial literacy among youth compared to previous economic busts</p>	<p style="text-align: center;"><b>Technological</b></p> <p>1. AI can lead to better predictions in investing</p> <p>2. Autopilot investing will be the next passive investing</p>
<p style="text-align: center;"><b>Legal</b></p> <p>1. Canadian regulators will act with higher regulations against manipulative trading</p>	<p style="text-align: center;"><b>Environmental</b></p> <p>1. Special investment plans that are cautious about environmental impact</p>

Please note that our free summary reports contain the SWOT and PESTLE table contents only.

The complete report for **Wealthsimple Inc.** SWOT & PESTLE Analysis is a paid report at **21.53 U.S.D.**



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