For adviser use only. Not for use with customers.

Adviser Analytics

At a glance

As part of our commitment to continue listening to feedback from our intermediary partners, we've refreshed Platform Services and we're excited to share our new reporting suite, Adviser Analytics.

We've improved stability, performance, filtering and export capabilities to allow you to efficiently create reports such as AUA, monies in/out.

Here's the key points at a glance. For more information get in touch with your usual Aviva contact.

Improved interactive data	You can access raw data by interacting with the widgets on the summary page, view client's holdings by investment or product type.
Explore consolidated AUA data	You can access all assets data within one consolidated view, including models and cash holdings.
New capital flows data	See future monies in and monies out at a client level, such as regular contributions and phased drawdown. As well as being able to export data on in-flight transfers.
Improved filter and export functionality	Use a number of filters to get the data you require and move the columns to see the data that matters to you the most. You can then export the required data to Excel, quickly and efficiently.
Explore ISA opportunities*	You can view ISA allowance data including opportunities to Bed & ISA from linked Investment Portfolio accounts.
View fees & charges*	See client level ongoing fee data including product fees and adviser charging.

*ISA Opportunities and Fees & Charges will be available in early 2026.

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