

# Why integrate with Transact?

We offer a suite of APIs designed to streamline adviser workflows including **Account Opening, Valuation, Transaction and Remuneration.**

By integrating with us, you open the door to:

- **3,458 adviser firms**
- **8,280 advisers**
- **11,500 Paraplanners and Administrators**
- **242,800 portfolios on the platform**

## Proprietary technology

Our APIs are powered by propriety, in-house technology, ensuring:

- Faster integration with direct engineering support
- Implementations that focus on our partners' needs
- Enterprise-grade security (OAuth 2.0, etc)

## Building momentum within our adviser base

- **2,800+ firms now integrate with a software provider on our platform**
- **3 in 4 advisers using Transact send data to planning tools**, and 2 in 3 import it, showing strong demand for two-way connectivity (Investment Trends Report\*)
- **Adviser registrations from existing firms up 54%** quarter on quarter, reflecting trust and strong referrals
- **19,000 illustrations and 9,500 new portfolios** created in the past year, highlighting sustained adviser activity

## Powering firms of all sizes

We support a diverse adviser community ranging from 1 to 2 adviser practices through to nationals with 250+ financial advisers.

## We understand software providers' needs by:

- Providing full documentation and test accounts for development
- Employing industry standard approaches to API design, making connecting easier
- Continuously enhancing our award-winning platform for lasting value
- Expanding future API capabilities to support key processes (e.g. illustrations, top-ups, withdrawals, rebalances)

## Growth backed by results

- **£65.9bn in Funds Under Direction** as at March 2025
- Over the first half of the financial year, **net inflows hit £2.1bn**, up 91% year on year

## Platform of choice for advisers

We've reinforced our leadership position, topping the latest Investment Trends Survey\*.

- **Rated #1 UK platform for overall satisfaction**
- Achieved the **highest Net Promoter Score** in the industry
- **Ranked first in 10 of 19 service areas**, including Portfolio Management/Transaction tools, Adviser Business Reporting and Technical Support

Source: Transact. Data as at Q2 FY25 (1 January 2025 – 31 March 2025) unless stated otherwise.

\*The recent Investment Trends 2025 report was based on feedback from 883 advisers. Investment Trends is a multinational research organisation providing business insights and decision support information to many of the world's leading financial services organisations.

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