A True Independent Partner for Wealth Management Firms

Founded in 2019, MarketDesk provides financial advisors with a full suite of institutional tools to scale their business, save time, and enhance their client offerings. Our platform is designed to serve as a seamless extension of your team, expanding your portfolio management and client communication capabilities virtually overnight. Trusted by over 125 wealth management firms, we are committed to being your long-term partner and helping you grow your business.

Watch On-Demand Demo →

Why Partner with MarketDesk?

You are focused on growth, but you also want to continue providing the level of service your clients have come to expect. Driving growth is time-consuming and can often strain your limited resources. Most likely, your firm has reached the stage where you are trapped by scalability – perhaps your AUM doubled in recent years, or maybe clients are asking for a wider array of high-net-worth services. All wealth management firms reach a point where they must find new efficiencies as they scale to the next stage.

MarketDesk offers you the opportunity to save time and refocus on growing your business. Our full suite of solutions adds efficiency to your day-to-day workflows. Our platform is designed to serve as a seamless extension of your team, expanding your portfolio management capabilities and enhancing your client communication. Advisors that use MarketDesk enjoy simplicity in their practices, allowing them to focus on exceptional client service and strategic growth.

Explore Advisor Benefits →

Explore Our Services

White Label Insights

- Client Newsletters
- Client Chart Presentations
- Prebuilt Webinars
- Compliance Support

Learn More

Model Portfolios

- ETF Asset Allocation
- White Label Stock Models
- Market Talking Points
- 20+ Leading Indicators

Learn More

Research Tools

- Data-Driven Insights
- Macro Strategy
- 30+ Asset Class Ratings
- Tactical Ideas

Learn More

125+	$49B	20+	3	0.00%
Firms Using MarketDesk Solutions	Combined AUM of Firms Using MarketDesk	Proprietary Leading Indicators	Robust Solutions Built for Financial Advisors	No Asset Based Fees

Advisor Benefits

Save Time & Cost While Unlocking Your Growth

MarketDesk

Unlock Your Growth – Streamline Operations & Prioritize Growth

Unlock your firm's growth potential by leveraging MarketDesk's solutions that streamline workflow processes, increase efficiency, and free up valuable time. Say goodbye to labor-intensive, non-revenue-generating tasks as our platform saves you hundreds of hours annually and allows you to prioritize client acquisition and strategic growth.

Turnkey Solutions – Upgrade Your Firm Overnight

Wealth management firms that experience outsized growth are not spending years of valuable time on the internal development of models, client presentations, and asset allocation frameworks. Instead of reinventing the wheel, supercharge your firm and experience accelerated growth with MarketDesk's turnkey solutions.

0.00% AUM Fees – The Independent Partner You've Been Looking For

Most service providers require financial advisors to hand over discretionary authority and/or pay fees based on your AUM. MarketDesk is built differently. Our platform expands your firm's capabilities at a fraction of the cost, while you maintain complete control over your portfolios and client relationships.

Institutional-Grade Framework – Robust, Repeatable Processes

MarketDesk's best-in-class solutions allow you to build a world-class wealth management firm. Our integrated platform streamlines workflows and strengthens the client experience. Designed to add efficiency to your practice, we provide institutional-grade resources and workflows across research, model portfolios, and client communication. Put simply, MarketDesk serves as a seamless extension of your team to help you meet the increased expectations of today's clients.

Additional Benefits

See the Difference 125+ Firms Already Have

Portfolio Benefits

- Increased Conviction in Allocations
- Rigorous Portfolio Construction
- Enhanced Risk Management

Operational Benefits

- Retain Custody & Portfolio Discretion
- Seamless Workflows Integrations
- 24/7 access to the MarketDesk team

Growth Benefits

- Scalable Solutions Built for Advisors
- Expand Your Capabilities Overnight
- Easy-to-Implement Resources

Time Management Benefits

- More Time for Client-Facing Activities
- Get Time Back with Friends & Family
- Refocus Your Team's Efforts on Growth

Your Clients' Benefits

- Timely Insights & Communication
- Presentations to Grasp Topics Easier
- More Consistent Portfolio Construction

Cost Benefits

- Pricing Based on Seats, Not AUM
- Consistent Pricing as You Grow
- Save Costs on Existing Subscriptions

Model Portfolios

Backed by Quantitative Research Framework

MarketDesk

Investment Philosophy

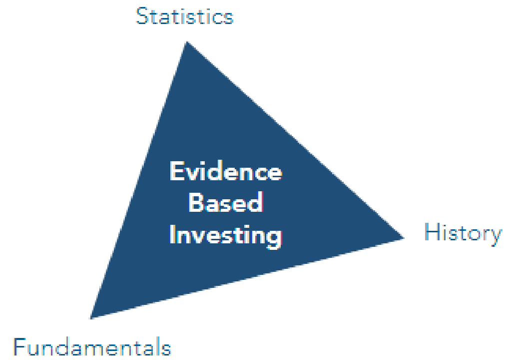
Repeatable Quantitative Process

Our investment approach is centered around evidence-based investing. Instead of basing decisions on near-term trends or "expert" opinions, our team focuses on historical data, leading indicators, and statistical probabilities to guide core asset allocation ratings and tactical idea generation. This quantitative overlay rewards facts, not opinions.

✓ **Disciplined Investment Process** – Consistent, repeatable framework

✓ **Active Risk Management** – Focused on minimizing portfolio volatility

✓ **Long-term Perspective** – Risk-adjusted returns across market cycles



Leading Indicators

Simplifying Asset Allocation

A leading indicator is an economic factor or variable that tends to change before the overall economy. Our team uses leading indicators to forecast broader shifts in the market before they occur. The *Quant Pack Report* houses 20+ proprietary indicators MarketDesk has developed to guide asset allocation decisions.

✓ **Early Signals** of Future Changes in the Economy

✓ **Eliminate Guesswork** from Investment Decisions

✓ **Enhance Returns** for Risk-Adjusted Portfolios with Less Volatility

Free Download

No Email Required

U.S. ETF Asset Allocation

- Core & Tactical Series
- Available in 5 Risk Profiles
- 7-10 bps Blended ETF Fees
- Monthly Updates

View Details

Global ETF Asset Allocation

- Core & Tactical Series
- Available in 5 Risk Profiles
- 7-10 bps Blended ETF Fees
- Monthly Updates

View Details

Focused U.S Large Cap

- 30 Equal Weight Holdings
- Russell 1000 Universe
- Quantitative Strategy
- Monthly Updates

View Details

Focused U.S. Small Cap

- 60-80 Holdings
- Russell 2000 Universe
- Quantitative Strategy
- Monthly Updates

View Details

Focused U.S. Dividend

- 60-80 Holdings
- S&P 1500 Universe
- Quantitative Strategy
- Monthly Updates

View Details

Focused U.S. ESG

- 30 Equal Weight Holdings
- MSCI KLD 400 Universe
- Quantitative Strategy
- Monthly Updates

View Details

Focused U.S. Momentum

- 30 Equal Weight Holdings
- Russell 1000 Universe
- Quantitative Strategy
- Monthly Updates

View Details

Start Free 14-Day Trial to See Latest Holdings

Research Coverage

Institutional Data-Driven Resources for Financial Advisors

MarketDesk

Research Philosophy

Our investment approach is centered around evidence-based investing. Instead of basing decisions on near-term trends or "expert" opinions, our team focuses on historical data, leading indicators, and statistical probabilities to guide core asset allocation ratings and tactical idea generation. This quantitative overlay rewards facts, not opinions.

Macro Strategy

Analysis across asset classes and macro conditions. Timely strategy pieces and QuickTake commentaries to keep you ahead of the market narrative.

Core Ratings

30+ ratings across sectors, factors, credit, and international markets. Monthly updates designed to monitor current views and inform positioning.

Tactical Ideas

Idea generation across industries, themes, and equities. MarketDesk's data-driven tools help to systematically find tactical opportunities.

Report Lineup

Category	Frequency	Report Title & Description
Macro Strategy	*Quarterly*	**Asset Allocator's Guide** — Our most read report. Quarterly roadmap to guide high-level portfolio allocations and enhance investment committee decisions.
	Monthly	**Monthly Roundup** — Highlights key trends and core ratings updates intra-quarter. Pulls together commentary from the monthly core reports. Designed for clients with limited time.
	Monthly	**Strategy Snapshot** — Timely strategy pieces looking across asset classes and macro conditions.
	Weekly	**The Weekly Note** — Weekly report discussing timely market topics. Page 2 highlights six timely charts defining each week. Page 3 is a weekly asset class performance heatmap.
Core Ratings	*Monthly*	**Sector Insights** — Coverage of all 11 U.S. sectors and underlying industries. In-depth look at fundamentals, earning trends, technicals, and investor sentiment / positioning.
	Monthly	**Factor Views** — Coverage of all 8 primary equity factors. Analysis includes an in-depth look at fundamentals, earning trends, technicals, and investor positioning.
	Monthly	**Credit Strategy** — Summary of macro trends and key economic indicators across both Emerging and Developed Markets
	Monthly	**International Markets** — Summary of macro trends and key economic indicators across both Emerging and Developed Markets.
	Monthly	**Economic Monitor** — Tracks key indicators across labor markets, consumption, housing, manufacturing, and more.
Tactical Ideas	*Bi-Weekly*	**Tactical Tradebook** — Data-driven tool to systematically find tactical opportunities.
	Weekly	**U.S. Stock Scores & Idea Screens** — Efficiently find new ideas in the S&P 1500 across various screens.

White Label Insights

Client-Friendly Newsletters & Charts for Financial Advisors

MarketDesk

Overview

Save time, enhance your client experience, and grow your practice. Our team creates institutional quality insights. You customize the material with your brand. Your clients and prospects receive timely market insights from your firm. See the **FAQs** to learn more.

✓ Simple Pricing of $250/quarter

We are proud to say MarketDesk White Label Insights have a 97% renewal rate since inception. However, there is no long-term contract and you can cancel at any time.

✓ Stand Out & Convert More Prospects

Differentiate your firm and stay top of mind with prospective clients by regularly providing value-add insights.

✓ Save Time & Grow Your Firm

Elevate client engagement with timely market insights and effortless explanations of investing and financial planning concepts. Save +10 hours each quarter drafting and creating the content and refocus that time on growth.

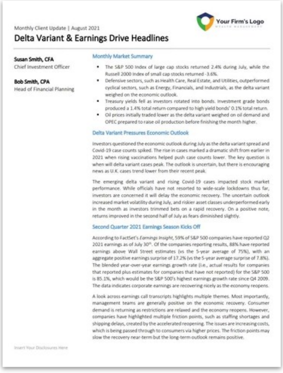
✓ Higher Quality Content in Less Time

Access a comprehensive library of easy-to-use client insights, saving you hours of research and creating client communication from scratch. White Label Insights allow you to deliver valuable insights quickly and easily.

Sample Client Communication

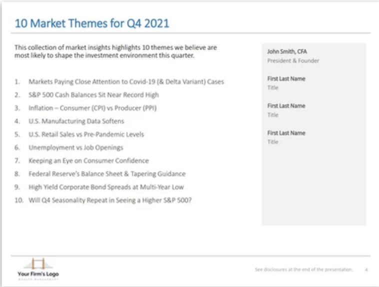
Quarterly Client Letter

View Sample →



Monthly Client Letter

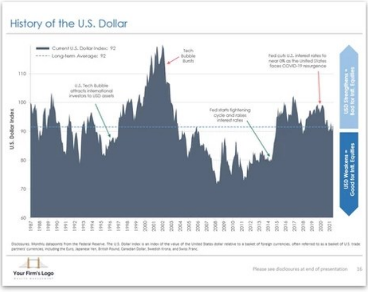
View Sample →



Quarterly Webinar [1]

View Presentation →

View Talking Points →



Off-the-Shelf Presentations

Financial Planning →

Equity Markets →

Credit Markets →

Global Economics →

[1] The Quarterly Webinar is included in the OCIO subscription. **Learn more →**