



CMC Markets Stockbroking Signs New Partnership with Sharesight

Offering includes seamless access to Xero cloud-based accounting software

30 January 2014: CMC Markets Stockbroking is rewarding investors in its Premium Traders tier by providing complimentary access to Sharesight's investor plan, which includes portfolio tracking and tax reporting that is fully integrated within its online broking platform. The deal with Sharesight also gives CMC Markets clients the ability to connect their account to Xero through Sharesight.

Xero is next-generation cloud-based accounting software, enabling them to share portfolio access with their accountant, to streamline and simplify tax reporting. Sharesight is a cloud-based portfolio aggregation, tracking, and reporting application that records trades, dividends, and corporate actions automatically.

Andy Rogers, Head of CMC Markets Stockbroking says through Sharesight investors can track an unlimited number of trades and holdings for up to three portfolios. Clients can choose from nine types of reports, such as Performance, Taxable Income, Capital Gains (realised and unrealised), and Future Income.

The Sharesight and CMC Markets combination gives investors a seamless connection to features traditionally found on professional-only platforms and wraps, like low cost trading, live price data, tax, and performance reporting.

"Our partnership with Sharesight rewards investors by delivering critical information in real-time so they can make better informed decisions to succeed in generating wealth, while reducing administrative tasks such as taxation returns," says Rogers.

Sharesight connects to a cloud ecosystem, which includes seamless access to Xero's cloud-based accounting software. If clients have a Xero account, all trades and related investing activities made with CMC Markets will flow to Sharesight and on to Xero in real-time, forming an automatic investment accounting solution. Clients can then choose to share portfolio access with their accountant for tax and accounting purposes.

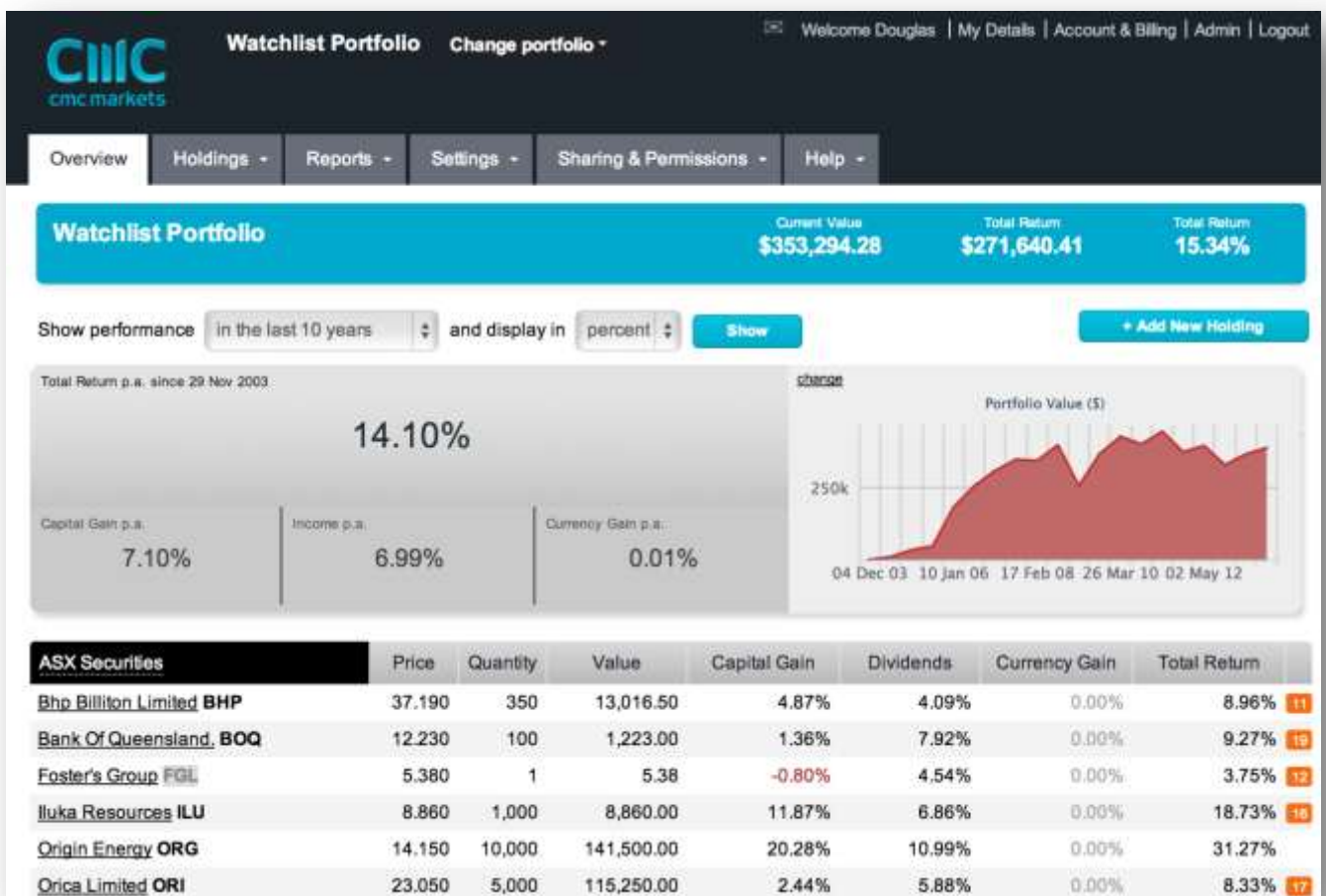
"CMC Markets has carefully considered this new framework and structure by bringing together complementary assets that enable investors to be more productive, collaborative and successful" says Chris Ridd, Managing Director, Xero.

"The ability to assess financial information in real-time using Xero is a real win for investors and unique to the market. It enables our joint customers to be proactive, easily identify opportunities and save time on admin. We are looking forward to continued participation and success as our companies collaborate to support our joint customers."

Rogers adds, "Our research suggests that frequent traders are demanding more than the standard year-end tax statement from their broker. They want an advanced tax reporting system that is updated in real-time and has the flexibility to import their trade history whilst within their trading platform".

"Where previously this had not been possible, the Sharesight portfolio tool now offers investors the flexibility and ease-of-use to import trade history from another broker within minutes, totally removing the barriers to switching for investors seeking out better value brokerage and access to the tools and technology that they need to succeed in generating wealth through trading," added Rogers.

Fig 1: Sharesight portfolio tracking and reporting application provides investors with institutional-level features in real-time.



Doug Morris, General Manager of Sharesight says self-directed investors have long sought choice when it comes to investing, but have been hamstrung by lack of access and antiquated technology.

"Investors today expect real-time access to critical information such as true performance figures, taxable income, or capital gains positions. Given the importance that investing plays in people's lives, the technology available should

be just as good as what we've come to expect from online shopping or social media and that's what Sharesight provides," adds Morris.

In addition to recording all trades from CMC Markets automatically, Sharesight allows clients to add investments held in other brokerage accounts and other investment entities. Sharesight has a rich database of price history and corporate actions from exchanges around the world, allowing clients to aggregate all their investments in one, centralised, cloud application.

"Alongside superior value and outstanding service, our hallmark is providing investors with access to the most sophisticated technology currently available through our online broking platform. Sharesight is another example of this strategy coming to fruition," says Rogers.

Sharesight plans a raft of new features for 2014, all of which will be available to CMC Markets clients.

Ends.

About CMC Markets Stockbroking

- The CMC Markets Group, a leading independent financial services provider, offers a range of investment products and investment tools including shares, options, listed managed investments, warrants, interest rate securities and Contracts for Difference (CFDs).
- 2007 CMC Markets launched its broking service, CMC Markets Stockbroking, which is now one of the few remaining non-bank aligned, online stockbrokers in Australia.
- CMC Markets Stockbroking is a participant of the ASX Group and is regulated by ASIC in Australia.

For more information about CMC Markets, please call 1300 726 093 or visit www.cmcmarkets.com.au

About Sharesight

- Sharesight is a Wellington, NZ-based firm with offices in Sydney, providing a cutting edge, cloud-based portfolio engine for self-directed investors, accountants, and financial advisers.
- Sharesight is an independent investment utility offering free and paid subscription plans in addition to referral and enterprise arrangements via its API.

For more information:

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