

DundeeWealth Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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Abstracts

DundeeWealth Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between DundeeWealth Inc. and its competitors. This provides our Clients with a clear understanding of DundeeWealth Inc. position in the Industry.

The report contains detailed information about DundeeWealth Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for DundeeWealth Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The DundeeWealth Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and company's long-

term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes DundeeWealth Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of DundeeWealth Inc. business.

About DundeeWealth Inc.

Dundee Wealth Management, Inc. is a Canadian publicly traded wealth management company, which provides investment management, securities brokerage, financial planning and investment advisory services to individuals, financial advisors, institutions, corporations and foundations. The Company carries on its business through its partially owned subsidiary DWM Inc., and through the operating subsidiaries of DWM Inc. As of May 1, 2004, the Company held directly an 83.7% equity and voting interest in DWM with the remaining 16.3% equity and voting interest in DWM held by the Caisse de dépôt et placement du Québec (the Caisse). The Company is a 67.7% owned subsidiary of Dundee Bancorp, Inc., as of January 5, 2004.

Dundee Wealth has three main businesses: investment management; financial advisory; and capital markets, comprised of institutional sales and trading, investment banking and research.

Investment Management

Dundee Wealth's investment management business consists of creating, managing and administering investment products and providing internal and third-party management and advisory services.

Investment Products

Dundee Wealth, through Goodman & Company, Investment Counsel, Ltd., has created and is managing and administering the following investment products that include:

Dynamic Funds consisting of approximately 110 publicly offered mutual funds that cover a broad range of asset classes (equity, fixed income, balanced, specialty), investment disciplines (value, growth, focus) and geographic focuses (Canadian, U.S., European, international), including Dynamic Value, Dynamic Power, Dynamic Focus+, Hathaway Focus+, Commonwealth and Cartier funds.

Closed-end Investment Products, the securities of which are traded on an exchange and the portfolios of which are designed to invest in one or more sectors and assets. Goodman manages three such products, namely diversiTrust Income Fund, diversiTrust Stable Income Fund and diversiTrust Income+ Fund, each of which invests primarily in a portfolio of income securities including income trusts to achieve a stable stream of monthly cash distributions and the return of the original unit issue price within a specified period of time.

Tax-advantaged Investment Products including a family of tax-advantaged mutual funds under the name of Dynamic Global Fund Corporation managed by Goodman which allows investors to switch among funds while deferring income taxes and other products designed to allow investors to participate in tax-assisted investments which permit income tax deductions to be allocated to, and utilized by, investors. These investment products include the CMP Resource limited partnerships (the CMP LPs) and the Canada Dominion Resources limited partnerships (the CDR LPs) which invest in a diversified portfolio of flow-through shares of resource companies; a labour-sponsored investment fund, Dynamic Venture Opportunities Fund Ltd., that seeks to achieve long-term capital appreciation by making venture capital investments in small and medium-sized Ontario companies from a diverse range of industries that qualify for federal and provincial tax benefits; and a Quebec tax product, Dynamic QSSP Fund, which invests primarily in a diversified portfolio of small to medium capitalized Quebec-based companies which are deemed to be eligible under the Quebec Stock Savings Plan.

Private Client and Fee-based Investment Products including high net worth client accounts managed by Goodman Private Wealth Management and the Viscount Wealth Management Program, a proprietary fee-based wrap product, which offers a third party, multi-manager and multi-style investment program complete with financial planning and

comprehensive reporting.

Alternative Investment Products, which are designed to permit investors to diversify in varying investment strategies, such as short-selling, swaps and leveraging, which are not permitted for traditional mutual funds, including a number of privately offered hedge funds such as Dynamic Equity Hedge Fund.

Financial Advisory

Dundee Wealth's advisory business, which encompasses the financial advisors of Dundee Securities, Dundee Private In

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

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1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.

The complete financial data is available for publicly traded companies.

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ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3×3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

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