

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

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## Abstracts

Financial Engines, 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 Financial Engines, Inc. and its competitors. This provides our Clients with a clear understanding of Financial Engines, Inc. position in the Industry.

The report contains detailed information about Financial Engines, 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 Financial Engines, 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 Financial Engines, 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 Financial Engines, 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 Financial Engines, Inc. business.

### **About Financial Engines, Inc.**

Financial Engines, Inc. and its subsidiaries provide independent, technology-enabled portfolio management services, investment advice, and retirement help to participants in employer-sponsored defined contribution plans, such as 401(k) plans.

The company helps investors plan for retirement by offering personalized plans for saving and investing, as well as by providing assessments of retirement income needs and readiness.

The company targets three key constituencies in the retirement plan market, including plan participants (employees of companies offering 401(k) plans), plan sponsors (employers offering 401(k) plans to their employees) and plan providers (companies providing administrative services to plan sponsors).

### **Products and Services**

The company provides individuals with personalized portfolio management services, investment advice and retirement help to plan participants through plan providers. For retirement plan participants, the company provides personalized, unconflicted advice and management services to each individual's specific investment needs and goals,

using the investment options available through their employer-provided plan. The company offers three principal services, including professional management, online advice, and retirement evaluation.

Professional Management is a discretionary managed account service designed for plan participants who want affordable, personalized and professional portfolio management services, investment advice and retirement help from an independent investment advisor without the conflicts of interest that can arise when an advisor offers proprietary products. The company's investment recommendations are limited to the investment alternatives available in a 401(k) plan as determined and approved by a plan fiduciary. As of September 30, 2009, the company had 16 Investment Advisor Representatives.

Online Advice is a nondiscretionary Internet-based service designed for plan participants who wish to take an active role in personally managing their portfolios and offers personalized advice for retirement portfolios. The company provides this service by acting as a subadvisor to a plan provider acting as the investment advisor to plan participants.

Retirement Evaluation is a retirement readiness assessment provided to plan participants upon rollout and generally annually thereafter, together with a Professional Management enrollment form.

The company delivers its services to plan sponsors and plan participants primarily through connections to eight retirement plan providers. In addition, it has connectivity with Charles Schwab to support one plan sponsor. It targets large plan sponsors across a range of industries. As of September 30, 2009, the company had signed contracts to make its services available through 107 Fortune 500 companies and 7 Fortune 20 companies. As of September 30, 2009, the company were under contract to provide either its full suite of services, including Professional Management, Online Advice and Retirement Evaluation, or its Online Advice service only, through approximately 765 plan sponsors with approximately 7.6 million plan participants whose retirement savings. Within this group, the company provides its full suite of services to 341 plan sponsors representing approximately 3.7 million participants. As of September 30, 2009, the company had 24 plan sponsors, representing approximately 870,000 plan participants.

## Competition

Direct competitors who offer independent portfolio management and investment advisory services to plan participants in the workplace include Morningstar, Inc., GuidedChoice, and ProManage LLC. Plan providers that offer directly competing portfolio management and investment advisory services to investors in the workplace include Fidelity and Merrill Lynch. Target-date funds are offered by multiple financial institutions, BlackRock, T. Rowe Price, Fidelity, and The Vanguard Group, Inc.

## History

Financial Engines, Inc. was founded in 1996.

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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DISCLAIMER

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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.  
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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 3x3 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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