

# Investors Capital Holdings, Ltd. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

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## Abstracts

Investors Capital Holdings, Ltd. 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 Investors Capital Holdings, Ltd. and its competitors. This provides our Clients with a clear understanding of Investors Capital Holdings, Ltd. position in the Industry.

The report contains detailed information about Investors Capital Holdings, Ltd. 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 Investors Capital Holdings, Ltd.. 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 Investors Capital Holdings, Ltd. 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 Investors Capital Holdings, Ltd. 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 Investors Capital Holdings, Ltd. business.

### **About Investors Capital Holdings, Ltd.**

Investors Capital Holdings, Ltd., through its subsidiary, Investors Capital Corporation, provides various financial services to the public.

#### **Broker-Dealer Services**

##### **Investors Capital Corporation**

Investors Capital Corporation (ICC) is a securities broker-dealer with the Financial Industry Regulatory Agency (FINRA), the Securities and Exchange Commission (SEC), the Municipal Securities Rule Making Board (MSRB), and the Securities Investor Protection Corporation (SIPC). The wholly-owned subsidiary of the company, also is duly registered and doing business as a broker-dealer in all 50 states, the Commonwealth of Puerto Rico and the District of Columbia. ICC makes available multiple investment products and provides support, technology and back-office services to a network of producing (non-staff) independent registered representatives.

The company provides broker-dealer services primarily in support of trading and investment in securities, such as corporate stocks and bonds, U.S. government securities, municipal bonds, mutual funds, variable annuities, alternative investments,

and variable life insurance, including provision of market information, internet trading, portfolio tracking facilities, and records management.

**Broker-Dealer Representatives:** The company's independent representatives are duly registered under federal and state law to offer and provide broker-dealer services to investors through ICC. Its training programs for representatives emphasize the long-range aspects of financial planning and investment. In addition to various products and services, the company offers prospective representatives a commission payout and the independence of owning and operating their own offices. It concentrates on providing technical, regulatory, supervisory, compliance, and other support services to its independent investment professionals.

**Support to Representatives:** The company provides various services and products to its representatives. Its technology, including client and corporate Web site, enable its representatives and their clients to perform tasks on-line, including opening of new accounts; monitoring of existing accounts; updating of client accounts; initiating and executing trading activities; viewing and downloading commission data; locating and exploring financial products; downloading client data; e-delivery of statements and confirmations; and researching reports or inquiries on companies, securities and other financial topics.

**Approved Investment Products:** The company's representatives offers various approved investment products to their clients. It follows a selective process in determining approved products to be offered to clients by its representatives, and periodically reviews the product list for continued maintenance or removal of approved status.

**Marketing:** The company provides advertising and public relations assistance to its representatives that improve their profile, public awareness, and professional stature in the public's eye, including FINRA-approved marketing materials, corporate and product brochures, and client letters.

**Supervision/Compliance:** The company maintains broker-dealer and investment adviser compliance programs. Its compliance department provides to its representatives with: advertising and sales literature review; field inspections, followed up with written findings and remediation programs; in-house publications, conference calls, workshops, seminars, and other communications on compliance topics; assistance with customer complaints and regulatory inquiries; regional and national meetings; and interpretation of rules and regulations and general compliance training.

Clearing: The company utilizes the services of Pershing LLC, a subsidiary of Bank of New York Mellon, a clearing firm to clear its transactions on a fee-for-service basis to provide orderly processing and clearing of majority of its brokerage securities transactions. Services provided by Pershing LLC, include billing and credit extension, as well as control, receipt, custody, and delivery of customer securities and funds.

#### Investment Advisory Services

The company provides investment advisory services, including asset management, conducting business as Investors Capital Advisory Services (ICA).

#### Insurance Operations

The company's wholly owned subsidiary, ICC Insurance Agency, Inc., is licensed to sell life insurance and annuity products.

#### History

Investors Capital Holdings, Ltd. was founded in 1995.

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.  
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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?

## I would like to order

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