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- before the expiration of the time limit for amending the claims and to be republished in the event of receipt of amendments (Rule 48.2(h))
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(54) Title: ELECTRONIC PLATFORM FOR MANAGING INVESTMENT PRODUCTS

(57) Abstract: Example embodiments of the present invention are directed to an integrated system and methods performed thereon for identifying customized structured investment products, certifying users to use and sell such customized structured products, selling and trading such customized structured products, and monitoring the performance of the customized structured products. The customized structured products are built from real time market data, client specific data, and/or performance metrics of other customized structured products.



WO 2018/100567 A3

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A. CLASSIFICATION OF SUBJECT MATTER
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ADD.
According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED
Minimum documentation searched (classification system followed by classification symbols)
G06Q
Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)
EPO-Internal, WPI Data

C. DOCUMENTS CONSIDERED TO BE RELEVANT		
Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
X	US 2015/348192 A1 (BRODER JASON [US]) 3 December 2015 (2015-12-03) the whole document	1-38
X	US 2016/092988 A1 (LETOURNEAU DENIS [US]) 31 March 2016 (2016-03-31) figures 1-4, 12A, 13 paragraphs [0002] - [0018], [0035] - [0074], [0124] - [0129]	17-38

Further documents are listed in the continuation of Box C.

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INTERNATIONAL SEARCH REPORT

Information on patent family members

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Patent document cited in search report	Publication date	Patent family member(s)	Publication date
US 2015348192 A1	03-12-2015	US 2015348192 A1	03-12-2015
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