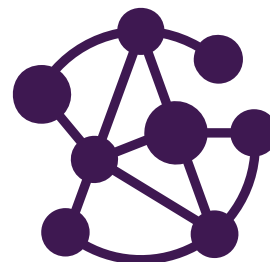# API FACTSHEET

## Access the calculations that power financial insights

### WHAT IS AN API?

An API (Application Programming Interface) is, effectively, the messenger between two systems. It is a pathway that enables data to be passed seamlessly from one application to another.

EValue's API platform is a highly scalable and secure service that provides our clients with easy and direct access to our Insight asset model and financial planning calculations, via a simple programmatic interface.

Clients can integrate their site or application with EValue's API service, enabling them to request calculations or forecasts through the interface, with the results returned instantly.

### WHY USE EVALUE'S API?

APIs provide our clients with the ability to easily integrate EValue's forecasting into their own site or app.

Through this direct access, the client maintains complete control over the user experience, with EValue's reliable calculations and forecasts complementing the service.

This straightforward access, via a 'lightweight' framework, also enables a faster time to market for clients looking to stay at the forefront of industry trends and differentiate their service from that of the competition.

### HOW ARE THE APIS ACCESSED?

EValue has created an API Portal where clients can:

- Learn about the APIs available
- Register for the EValue API service
- Access technical documentation
- View tutorials and code examples

- Test APIs in a sandbox environment
- Access the production environment
- Monitor usage and performance of the APIs

### MORE INFORMATION OR REQUEST A DEMONSTRATION?

**Visit us:** ev.uk     **Contact us:** +44 1635 881180     **Email us:** contact@ev.uk

## WHEN WILL THE APIS BE AVAILABLE?

Initially, the following five APIs are available:
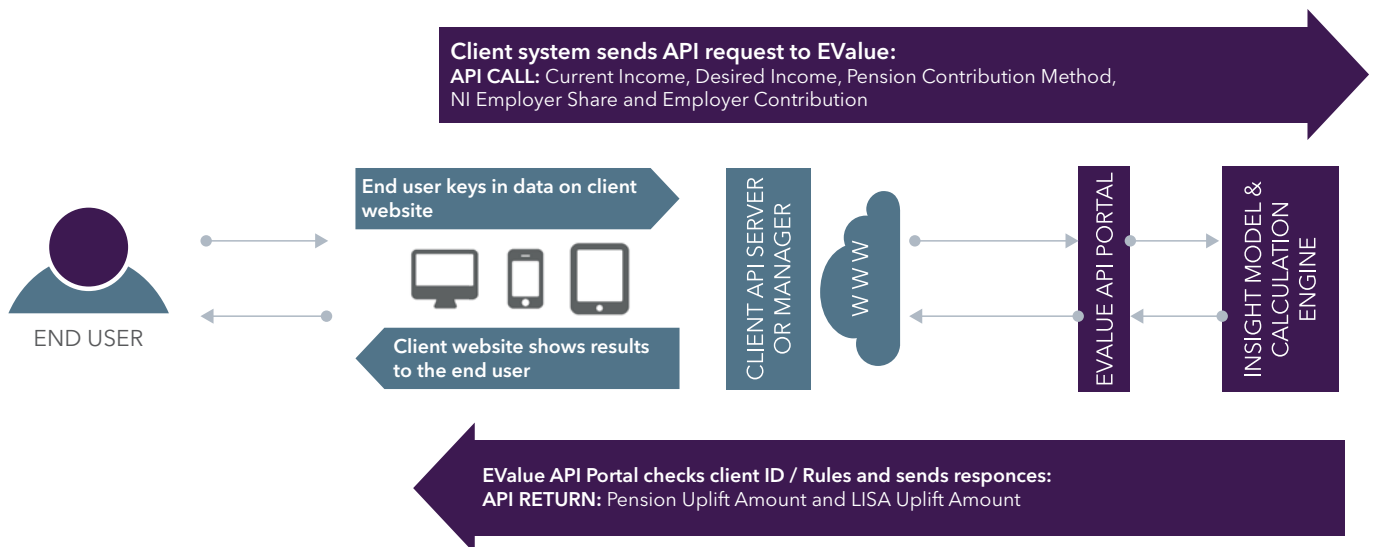
**Risk Suitability**
- Risk profiler

**Calculators**
- State pension age

**Investment Forecasting**
- Simple investment forecaster
- Chances of beating cash
- LISA Vs Pension comparison

Below is an example of how one of the APIs, Lifetime ISA Vs Pension Contribution, can be accessed.

**Client system sends API request to EValue:**
**API CALL:** Current Income, Desired Income, Pension Contribution Method, NI Employer Share and Employer Contribution

End user keys in data on client website

Client website shows results to the end user

END USER

CLIENT API SERVER OR MANAGER

WWW

EVALUE API PORTAL

INSIGHT MODEL & CALCULATION ENGINE

**EValue API Portal checks client ID / Rules and sends responces:**
**API RETURN:** Pension Uplift Amount and LISA Uplift Amount

## WHAT FUTURE APIS ARE BEING PLANNED?

Following the initial release in March 2017, future APIs will include:

**Risk Suitability**
- Fund Risk Assessment
- Portfolio Optimisation
- Efficient Frontier

**Calculators**
- Budget requirements
- Life expectancy

**Retirement Forecasting**
- Retirement forecaster
- Workplace structure
- Drawdown
- Contribution backsolve

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