2025 T3/Inside Information Software Survey: A Triumph for VADIS

The latest **2025 T3/Inside Information Software Survey** of Advisors has been released, and it brings exciting news for First Affirmative's Values-Aligned Direct Index Solution (VADIS) built in partnership with YourStake. We have made remarkable strides in several categories, showcasing the impact of our hard work and dedication to serving advisors and their clients. This accomplishment reflects recognition from advisors and the considerable advancements in the VADIS Workflow and portfolio construction technology.

Acknowledging Excellence

We owe a heartfelt thank you to everyone involved in making VADIS a leading name in Values-Based Portfolio Analysis Services. It is with great pride that we announce VADIS achieved the highest user rating of **8.29**, a testament to the quality and reliability of our solutions.

Survey Highlights

Software All Stars

The Software All Stars category highlights solutions that excel in market penetration and user satisfaction. On page 11, the survey celebrates:

- **SRI/ESG Analysis:** VADIS stands out with an impressive user rating of **8.29**.

Mighty Mites

The Mighty Mites category, detailed on page 12, recognizes solutions that may not lead in market share but shine with extraordinary user ratings.

- **Portfolio Management:**
  - **YourStake:** 8.26
  - **VADIS:** 8.50
- **Portfolio Design:**
  - **VADIS:** 9.17
- **SRI/ESG Analysis:**
  - **VADIS:** 8.67

SRI/ESG Portfolio Analysis Services

On page 40, the survey delves into the SRI/ESG Portfolio Analysis Services, where First Affirmative's VADIS and YourStake are among the top strategies, along with VADIS's predecessor, AffirmativESG. The survey notes the increasing competition faced by market leader Morningstar from these specialized platforms.

- **Morningstar's Challenge**:
  - As Morningstar added ESG statistics to its data platform, it became a dominant force. However, it now faces robust competition from YourStake and First Affirmative's VADIS.
  - **YourStake** is praised for its detailed analysis of the real-world impacts of portfolio changes.
  - **VADIS**, leveraging YourStake analytics, achieved the highest user rating of **8.29**, surpassing Morningstar's **7.58**.

Conclusion

This year's survey results are a clear indication that hard work, innovation, and dedication lead to exceptional outcomes. We are thrilled with the progress First Affirmative's VADIS and YourStake have made and are grateful for the trust and recognition from our advisors. Together, we continue to set new standards in Values-Based Portfolio Analysis Services and beyond. Thank you all for your unwavering commitment to excellence.

About First Affirmative:

Since 1988, **First Affirmative Financial Network** has been dedicated to assisting financial advisors and their clients create investment solutions designed to meet both financial and impact goals.

With extensive experience in Values-Aligned investment strategies and institutional asset management, First Affirmative allows advisors to deploy the fundamental research, quantitative techniques, portfolio construction, and management methodologies to deliver, outcome-oriented values-based solutions.

First Affirmative is proud to acknowledge our responsibilities as an investment fiduciary to care for the assets entrusted to us, to act in the best interests of our clients, and to prioritize client goals and objectives above our own. First Affirmative is a Certified B Corp and was honored as a "Best for the World" Company in 2019 by B Lab, the parent organization for Certified B Corps.

About YourStake

Founded in 2019, YourStake transforms how financial advice is delivered by creating order from chaos. The company serves thousands of advisors nationwide, providing integrated AI solutions alongside values-based investing solutions that help advisors spend less time on manual tasks and more time delivering personalization service to their clients. For more information, visit **www.yourstake.org**.

About the Annual 2025 T3/Inside Information Advisor Software Survey

The goal of this **annual survey** is to address the most basic questions that software users and competitors in the financial advisory space would plausibly be asking. The community of consumers and providers is interested in which tech solutions are most popular in each category, and the satisfaction levels (on a scale of 1-10) of their users. This data is especially important to the people who make software decisions at advisory firms—the consumers in this ever-evolving marketplace who are charged with creating and maintaining a functional tech stack in an ever-shifting marketplace.

The 2025 survey collected data from 2,128 advisory firm participants, anonymously, through the months of December 2024 and January and the first half of February 2025.

Read the **full report**