

A leading Asia-based hedge fund platform provider prepares for growth whilst reducing client onboarding time



READY FOR GROWTH

- Integrated front-to-back office platform
- No need to integrate third party OMS or PMS
- Scalable for additional products and/or increased trading volumes
- Ability to add new modules to meet evolving complexity and business requirements

DEDICATED, LOCAL SUPPORT

- Highly experienced Asia-based implementation and support teams
- Well-versed at migrating clients from legacy platforms
- Deep knowledge of challenges and opportunities in local markets

IMPROVED CLIENT SATISFACTION

- Reduced client onboarding time
- Asia-based SSAE18 certified data centre

CALL TO ACTION

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BUSINESS CHALLENGE

A leading Asia-based hedge fund platform provider for professional investors in Hong Kong and Singapore, was looking for a new portfolio management system with local support and scalability.

Supporting both established investors and anyone wishing to set up a new fund structure in Asia, they needed a fully integrated front-to-back office solution that would support them through their growth strategy. This meant finding an established technology provider in the solution space with strong financial credentials and a local team with experience and expertise, to ensure longevity and timely support.

PREPARING TO SCALE

With the growth of investor demand, as well as the level of service expected from partners and service providers, the platform needed to allow for an increasingly complex product mix, increasing trade volumes without system constraints and an improved client experience.

Additionally, to match the needs of their long-term growth plan, the platform provider needed a solution that could easily be adapted for new business requirements including market and regulatory change, and new client requests such as data visualisation and reporting capabilities.

KEY FEATURES

- Multi-asset, multi-fund
 - Long-short equity, long-only equity, global macro, market strategy and vol.
- Automated trade and portfolio reconciliation
- Integration with multiple service providers
 - Custodians, prime brokers and fund administrators

CREATING A UNIQUE PROJECT PLAN

Working side-by-side with the local Broadridge team, the platform provider was able to design a unique project implementation plan and split their business requirements into phases. This phased approach helped to prioritise business critical functions, manage costs effectively and reduce the impact of technology and operational change on their clients, as well as their internal business.

DELIVERING REAL BUSINESS VALUE

With the Broadridge portfolio management system, several manual processes were automated thanks to a centralised database, with direct impact on trade input and trade matching, as well as reconciliation; improving efficiency and reducing the risk of error.

Additionally, with the Broadridge Implementation teams' experience and market expertise a shorter onboarding cycle was created for new clients joining the hedge fund platform. In turn clients saw a reduced cost for onboarding and experienced shorter testing times.

WHY BROADRIDGE

Asset managers navigate complex relationships everyday – from investors to advisors to distribution partners – while dealing with legacy, siloed technology or disparate outsourced functions. They need transparency and flexible systems to engage with their clients, contend with oceans of data, keep up with ever-changing regulations, and effectively grow AUM. With our unmatched network and vantage point at the centre of the financial industry, we are uniquely positioned to meet those needs and drive innovation.

With Broadridge's Asset Management Solutions, our clients see an average of 30% efficiency gains through exception-based workflow and automation solutions, and significant savings in operational costs with our platforms.



Broadridge, a global Fintech leader with over \$4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimising efficiency and generating revenue growth.

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Ready for Next

Communications
Technology
Data and Analytics

