

Case Study

UBTI Efficiently Integrates Systems

An Asset Manager's Success Story



THE CLIENT

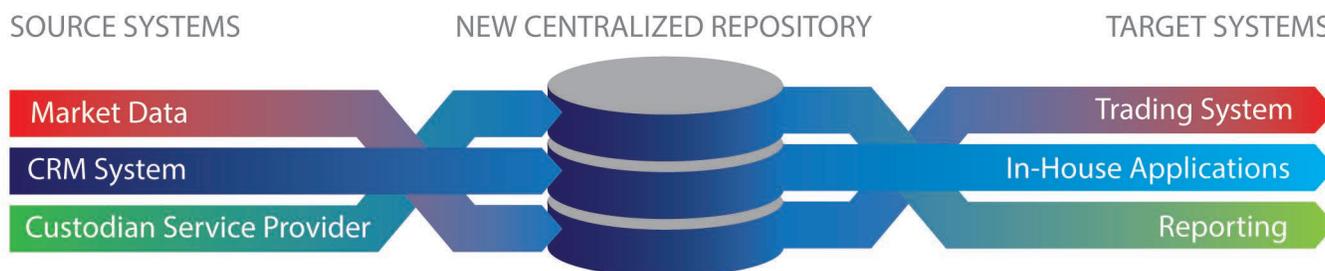
Global asset management firm with four decades of experience with investments across fixed income, equities, emerging markets, and alternative investments. The firm relies on data from vendors such as Bloomberg, Fitch, S&P, and Moody's for critical financial decisions. The information must smoothly integrate within their systems and be deployed for trading, in-house applications, and reporting.

CHALLENGES FACED BY CLIENT

Inconsistent data format – The vendors make frequent changes to the format of the data they provide, hindering the data feed due to the inconsistencies between the source and destination.

Keeping up with requests – The client deployed an in-house technology team to support end-users and execute enhancement projects. Unfortunately, they lacked the resources to address support requests in a timely manner.

Long-term enhancements superseded by urgent tasks – Frequent end-user requests added to the firm's backlog of projects. This resulted in their technology team's time being spent jumping from one short-term issue to the next, rather than developing enhancements and future roadmap requirements.



Data from various sources constantly propagate essential in-house and third party systems.

SOLUTIONS

The asset management firm hired UB Technology Innovations (UBTI), who provided the following solutions:

- UBTI became an extended arm of the client's technology team, helping them avoid the burden of hiring additional manpower and providing the flexibility to ramp up or down as needed.
- UBTI's expertise with ETL tools and data integration services streamlined the firm's processes and minimized the span of response to attend data inconsistencies.
- A knowledge repository was created for the technology team. By having a record of previous issues and solutions, the technology team was able to more efficiently address requests.

Now that the client isn't bogged down with requests, they are able to spend more time focusing on what matters most: managing risk, maintaining compliance, reducing expenses, and focusing on customers.