

Overcoming IT Challenges for an Asset Management Firm

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WHO WE ARE

“ UB Technology Innovations provides cloud data analytics for Azure infra, app migration, and modernization. Our team of certified cloud experts offers managed services, advisory services, licensing, and in-house training. As a Microsoft Power Platform delivery partner, we offer no/low-code solutions, virtual bots, RPA, and automation ”

WHAT WE DO

- Data Integration & Migration
- Customized Reporting
- Independent Validation & Verification (IV&V)
- Operation Support and Monitoring
- Application Development
- Reporting Service



THE CLIENT

Our client is a leading global asset management firm worth 20+ Billion USD and employs a deep value, credit-intensive approach across its investment platform. They specialize in value-oriented special situation investments.



CHALLENGES

A global asset management firm faced significant challenges due to rapid business growth. The firm's IT department struggled to keep up with the increasing demand for development, operations, and QA resources, leading to project backlogs and missed delivery deadlines. As a result, the firm was unable to focus on development and innovation initiatives, which were essential to maintaining its superior asset management and client relationships. Additionally, the firm's data was scattered across multiple data sources in different formats, making it difficult to get a holistic view of the business and coordinate operations effectively.



SOLUTION

UB Technology Innovations, Inc. (UBTI) offers a unique solution to businesses seeking efficient and effective management of their resources and asset management strategies. By deploying a dedicated team, clients have direct access to an IT consultant who can understand their specific needs and develop customized solutions to meet those needs. UBTI's solution leverages robust analysis and expert technical knowledge to implement smart business intelligence systems that optimize operations. Our team also works closely with clients to efficiently manage back-end efforts and backlog maintenance, freeing up internal IT resources to focus on more strategic initiatives.



UBTI became their IT division's extended arm and offered the following services:

- **Data Integration & Migration:**

The client's data was scattered across multiple data sources in different formats. UBTI moved the client's data into a central data repository, creating an efficient structure. The centralized repository provided visibility across different domains, making their analytics and decision-making process faster and helping reduce time and costs.

- **Customized Reporting:**

The client needed to create custom reports to account for each analyst's unique approach, portfolio, and unpredictable market conditions. UBTI transformed these reports into a source of competitive advantage for the client by providing daily customized reports that helped improve the value of the client's analytics and decision-making processes.

- **Independent Validation & Verification (IV&V):**

The client's IT department was understaffed and struggling to handle the increasing number of development projects and their QA requirements. UBTI helped the client to efficiently use their test repositories by providing cost-effective, zero-defect testing services, which enabled the client to keep their IT initiatives on pace with their business growth.

- **Operation Support and Monitoring:**

After-hours trading, the client performed important back-office tasks, such as retrieving and analyzing data from external sources and generating reports for the next day's trading. UBTI provided support to the client during off-hours by monitoring outside data sources and resolving issues quickly, which guaranteed smooth coordination and lower operating expenses.

- **Application Development:**

We provide comprehensive application development services using the latest technologies to build sustainable solutions. Our expertise includes modernizing existing systems, automating deployment processes, and establishing robust data management practices. We offer a centralized platform for data storage and analysis, supporting both pre-trade and post-trade operations. Our services ensure data integrity, accessibility, and compliance with industry standards.

- **Reporting Service:**

We offer tailored reporting solutions and analyst-specific reports. Our advanced dashboards, powered by Tableau, offer interactive visualizations to facilitate data-driven insights.



SOLUTION BENEFITS

These are the benefits that streamline the organization's IT process:

- **Reduced backlogs:** UBTI's solution helped the firm reduce its IT project backlogs by 80% within three years. This was achieved by automating many of the firm's IT tasks
- **Reduction in IT expenditure:** UBTI's solution helped the firm save a total of 60% on its IT expenditures. This was achieved by reducing costs in the following areas:
 - Application development
 - Testing
 - Operations
- **Improved productivity:** By automating many of its IT tasks and streamlining its IT processes, UBTI's solution helped the firm to improve its productivity. This freed up the firm's employees to focus on more strategic initiatives.
- **Greater focus on core activities:** The firm was able to focus on its core activities, such as asset management and client service, because UBTI handled all of the firm's IT needs, from development and maintenance to operations and support.
- **Lower Overhead Costs:** UBTI's solution helped the asset management firm to lower its overhead costs in some ways, including reduced need for IT infrastructure and staff, increased efficiency, and reduced risk
- **Flexibility of Ramp Up & Ramp Down:** This solution provided flexibility in quickly adjusting project resources to reduce stress during busy times or cut costs when demand drops. This allowed the firm to scale IT resources up or down as needed to meet fluctuating business demands.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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