

## A leading Asset Management Firm Gains Efficiency in Strategic and Operational Processes

### Client Background

Headquartered in Mumbai, the client is a subsidiary of a leading broking house in India operating with a diversified client base that includes; retail customers (including High Net worth Individuals), mutual funds, foreign institutional investors, financial institutions and corporate clients. The client is a leading asset management company in India offering focused equity schemes and strategies based on their expertise on Equity.

### Client Challenges

High operational costs, generation of the operational expenditure report, lack of single unified system were the main challenges of the company.

### Quick Facts

Single Unified System

Automated processes

Reduced turnaround time

Better investment decisions with powerful reporting engine

Comprehensive, fast, integrated compliance monitoring across all asset classes, markets and locations

### Solution

MoneyWare® Asset Management Solution

## Case Study: MoneyWare® Asset Management Solution



## The Miles advantage

The client is an existing customer of MoneyWare Suite for over a decade. The successful experiences in using the product for their wealth and portfolio management business led to the company choosing Miles as their technology partner.

## Solution Implemented

MoneyWare® Asset Management solution, built on Microsoft SQL Server2012, was deployed in a span of three months. The deployed solution helped asset managers effectively manage multiple portfolios with ease, speed, and efficiency. It also enabled seamless integration across all business processes that lead to real time portfolio processing. In addition, the solution gave the users a powerful and flexible reporting solution for exploiting the underlying business data to create and deploy reports with just a few clicks through drag and drop. It further removed dependency on multiple systems, and simplified their operations. Asset Managers could stay ahead, creating successful portfolios, and make informed investment decisions.

## Solution Benefits

- Single unified solution across front to back office operations.
- Asset Managers effectively manage multiple portfolios with ease, speed and efficiency.
- Automated processes
- Better performance and increased efficiency.
- Reduced Turnaround time and lower technology costs.

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### About Miles

The vision at Miles is to be the premier software solutions provider in the financial services industry and treasury departments of leading corporate houses. At Miles, we ensure that the clients' requirements are thoroughly understood and customized solutions are provided to them. These solutions are highly cost effective and surpass the client's expectations in terms of performance as well as affordability.

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