

Case study for **Investment Advisory Firm**

# Web and Mobile Versions of the Business Intelligence Portal for Portfolio Risk Management

Revolutionizing Investment Strategies and Enhancing Decision-Making with a Data Insight Platform

Industry: Finance

Location: USA

Employees: 28+



## Client Background

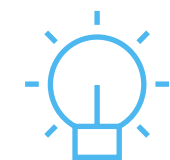
An up-and-comer in the hedge fund industry, the company offers investment advisory and portfolio risk management services. The company provides expert guidance on buying/selling investments as well as monitoring the investments' performance.

# Executive Summary



## Goals

Optimize risk and performance management processes, simplify investment decision-making, enhance data visualization and reporting, and introduce a more integrated approach to data access management.



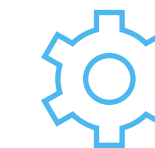
## Solution

A web and mobile business intelligence portal



## Benefits

Precision in Decision-Making, Effective Risk Management, Operational Efficiency Enhancement.



## Services delivered

Custom Software Development, Software Product Development, Web and Mobile App Development

# Business Challenge

The need to scale up the business and cope with growing data volumes has presented the US-based multi-strategy hedge fund with the challenge of optimizing and integrating its analytical solutions. The company approached Infopulse for our proven [custom software development expertise](#).

The main tool of investment advisors is a **portfolio and risk management portal**. It's a solution used for the management and analysis of investment portfolios and associated risks. The portal consists

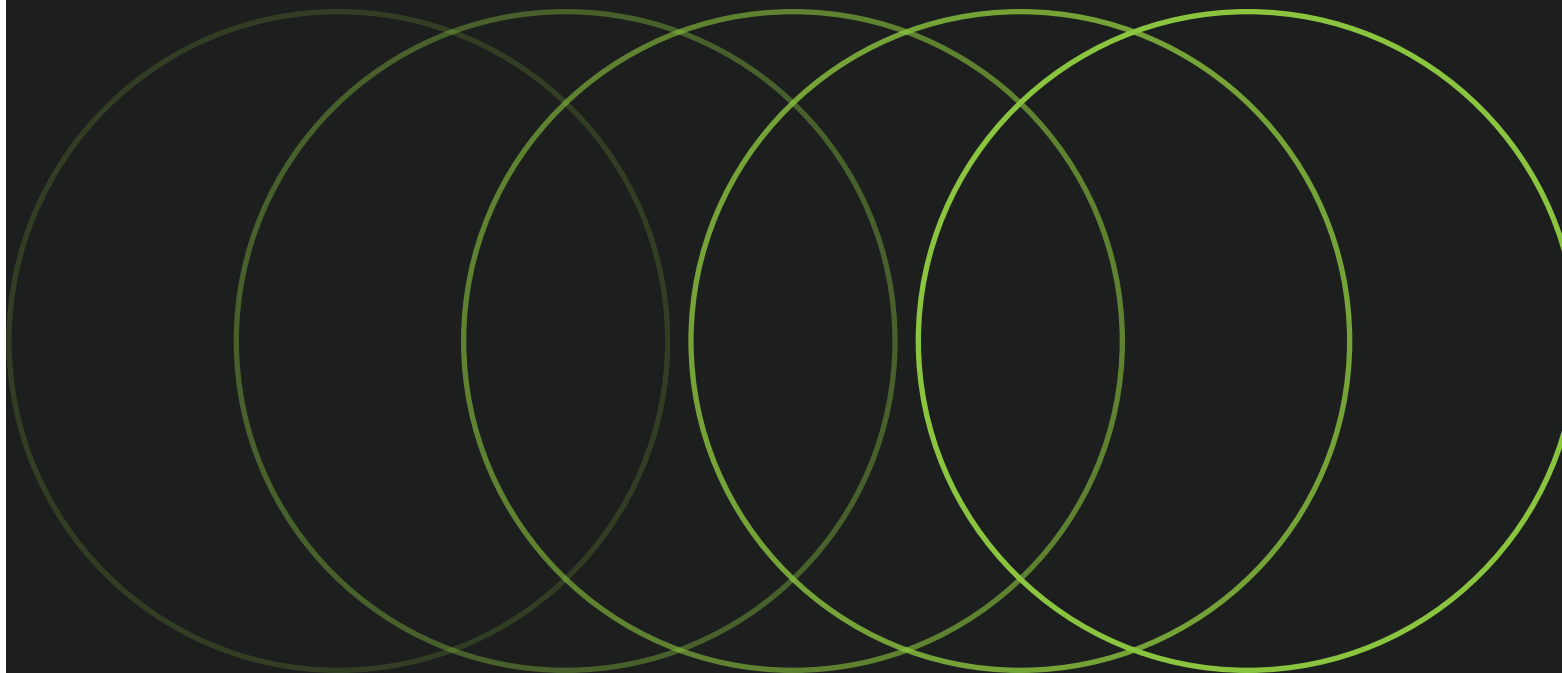
of performance reporting, risk analysis, asset allocation, financial planning, and investment research features. With the help of interactive dashboards, financial consultants can monitor the performance of their customers' investments, analyze risk exposure, and make informed investment decisions.

Through enhancing the **Big Data representation capabilities** of their portal, the investment advisory firm aims to overcome data friction and enhance the precision of decision-making for both their team and clientele.

## The business intelligence solution in question had to address the following challenges:

- Refine risk and performance management processes
- Become a comprehensive, all-in-one solution to simplify investment decision-making
- Reduce the complexity of data visualization and reporting
- Introduce a more integrated approach to data access management
- Trim costs associated with multiple software licenses and subscriptions

# Solution & Business Value



## Solution

In close cooperation with the client, Infopulse developed **a web and mobile version of the business intelligence portal**, providing risk managers with a powerful tool to analyze and control credit and market risks across all portfolios and asset classes.

We built **solution architecture** and designed **intuitive UI** that helped the client significantly optimize Big Data analysis and management. Now, integrated data access and customizable data representation are delivered within the centralized and streamlined portal.

### The key solution features include:

- **An intuitive drag-and-drop dashboard creator** – allows to rapidly assemble customized dashboards and widgets from a wide selection of repository elements
- **Highly customizable sets of rules and conditions for data representation and**

**formatting** – leverage the creation of sophisticated reports that reflect the unique needs of the business

- **Advanced tabular forms** that support both pivot-like and traditional table views – help to easily analyze and visualize complex data sets with maximum clarity and precision
- **Role-based access to data** – to ensure that team members can securely access and share the information they need to make informed decisions
- **Web and mobile solution versions** – provide the team with the flexibility to access and work with their data from anywhere, at any time

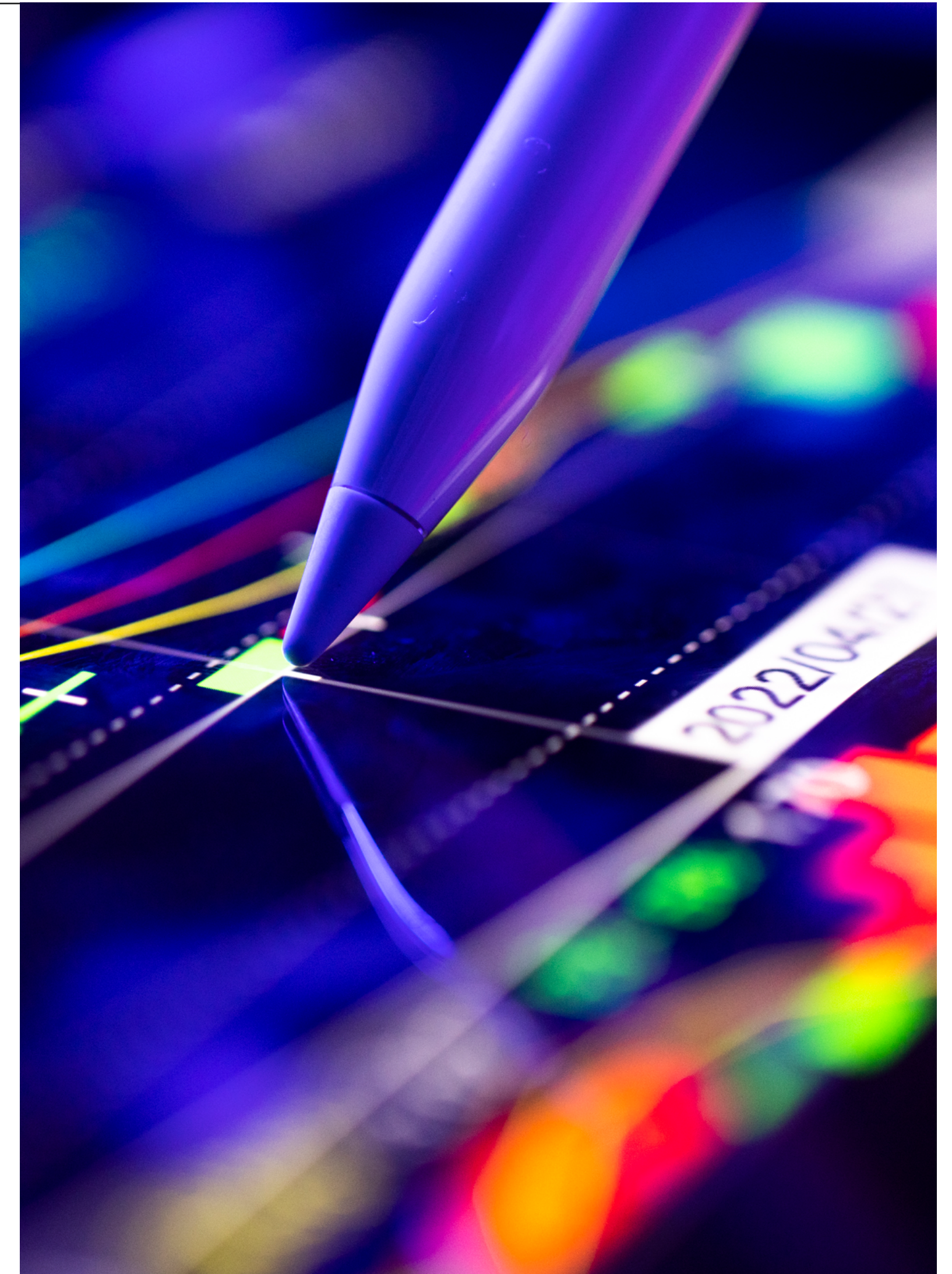
The Infopulse team continues extending and optimizing the solution functionality to accommodate the specific requirements of the hedge fund.

## Business Value

The **new unified, integrated portfolio and risk management portal** delivers precise analysis and visualization of aggregated data.

**The solution benefits are multi-faceted, including:**

- **Improved decision-making:** The portfolio and risk management portal provides investment advisors with real-time, comprehensive data on their customers' investments, enabling them to make more informed and accurate investment decisions
- **Better risk management:** With the portfolio and risk management portal, financial consultants can identify and monitor investment risks more effectively, leading to better portfolio diversification and risk mitigation
- **Increased operational efficiency:** The portal streamlines the investment management process, allowing specialists to work more effectively
- **Enhanced customer satisfaction:** Investment advisors can provide their customers with more personalized and informed investment advice, increasing customer satisfaction and retention



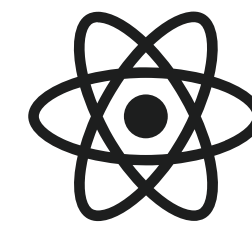
# Technologies & Tools



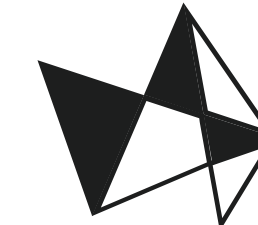
.NET Core



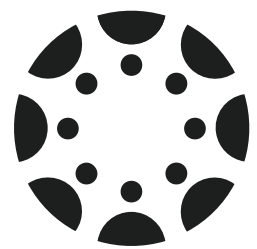
MS SQL



React



Highcharts



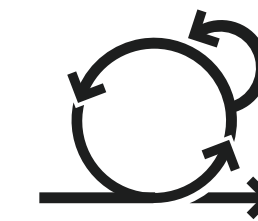
Canvas



JS Libraries



.NET



SCRUM



## About Infopulse

Infopulse, part of the leading Nordic digital services company TietoEVRY, is an international vendor of IT services with dedicated R&D center, offering custom software engineering to SMEs and Fortune 100 companies across the globe. As a certified partner of Microsoft, AWS, SAP, and Oracle, Infopulse delivers a comprehensive array of software engineering services, including Software Product Modernization, Custom Software Development, Low-Code and Cloud-native Development, as well as Software Quality Assurance.

Founded in 1991, the company has a team of over 2,000 professionals and is represented in 7 countries across Europe and the Americas. It is also trusted by many established brands, such as Allianz Bank, BICS, Bosch, Corteva, Credit Agricole, Delta Wilmar, ING Bank, Microsoft, Metinvest, Offshore Norge, OLX, OTP Bank, Santander, SAP, UkrSibbank BNP Paribas Group, VEON, Vodafone, Zeppelin, and others

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