

Bringing Data to the Front-line

From Complexity to Clarity:

How FINBOURNE Transformed a Leading
Asset Manager's Data Operations

What the experts are saying

“ This is a game-changer. FINBOURNE’s data mastering capabilities offer the scalability we need to grow our offerings while focusing on exceptional service. ”

Head of Risk, Operations, and Technology

“ Our technical architecture is extremely complicated. With FINBOURNE we have created a single source of truth without any disruption to our operations. ”

Business Manager

Background

Founded nearly 30 years ago, an alpha-driven specialist Asset Manager catering to institutional clients and HNWIs recognised that staying ahead of the market depended on their ability to innovate and deploy cutting-edge investment strategies.

However, after decades of operation, the firm’s enterprise architecture had become highly complex, limiting their ability to onboard new asset classes, adjust strategies, and ensure efficient end-to-end processes.

The Challenge

Bringing Data to the Front Line

The Asset Manager’s legacy technology was fragmented and inefficient. It relied on 25 internal systems, 60 data repositories, and multiple third-party vendors in a highly complex tech stack. This required significant bespoke development and frequent manual intervention to produce the data outputs needed by downstream teams and systems.

As a result, the firm faced several challenges:



Preparing for the future

The firm aimed to expand its asset range and scale operations but found that its existing systems and processes couldn’t support growth without costly development and manual workarounds.



Ensuring efficiency

Legacy technology required frequent manual intervention or bespoke development to merge and master data, hindering the firm’s ability to maintain cost-effective operations.

These inefficiencies risked compromising the firm’s ability to deliver timely and accurate services to clients. Ultimately, the firm needed to create a single source of truth for operational and investment teams, enabling them to access the information required to deliver outstanding client service.

The Solution

After a competitive tender process, the firm selected FINBOURNE to provide a scalable, future-proof solution:



EDM+

FINBOURNE's EDM+ ingests data from all the firm's sources and systems, mastering it into a single source of truth through a highly automated process. This data is supplied to downstream teams and systems, including their IBOR and ABOR, enabling fast start-of-day and end-of-day reporting. The implementation process leveraged FINBOURNE's pre-configured APIs, ensuring seamless integration with existing workflows and minimal disruption.



Luminesce

The firm leverages this data virtualisation engine to access and use data across business applications, including investment operations, HR, and CRM systems. This enables efficient reporting and seamless management of their expanding asset classes while empowering decision-making through advanced analytics.

Why They Chose FINBOURNE

- **Comprehensive Data Mastering:** FINBOURNE was the only vendor capable of integrating such a vast array of data sources and presenting them in a unified, understandable manner.
- **Flexibility:** The suite of APIs and extensive documentation allowed the firm to adapt the solution to fit its specific needs.
- **Scalability:** FINBOURNE's cloud-based infrastructure enables the firm to pursue its growth ambitions without being constrained by legacy technology.

The Outcome



Cost Savings

Decommissioning 20 legacy systems has delivered significant cost savings, freeing up resources to focus on strategic initiatives such as expanding client services and product innovation.



Portfolio Diversification

The firm has gained the flexibility to expand into new and more complex asset classes without being hindered by its previous infrastructure.



Scalability

Automation has enabled the firm to scale operations significantly, reducing manual workloads and improving operational efficiency.



Improved Client Service

Teams now provide clients with real-time, accurate information on their holdings, enhancing trust and positioning the firm as a leader in transparency.



About

FINBOURNE's solutions deliver an interconnected network of functionality and data that enables the investment community to better serve clients in a constantly evolving market.

Its investment management solutions and cloud-native data management platform ensure that investment and operations teams can increase revenue, reduce costs, and better manage risk across the investment life cycle.

Get in touch

To discover more about FINBOURNE and learn how our solutions can drive growth, increase control and improve data access, contact us below

finbourne.com/info@finbourne.com

+44 (0)20 3880 1307

FINBOURNE Technology

North America : 666 3rd Avenue, New York, 10017

Ireland : The Greenway, Dublin, D02 TD28

UK : 1 Carter Lane, London, England, EC4V 5ER

Singapore : 790, Level 7 Capital Square, 23 Church Street, 049481

Australia : 71 Eagle Eagle Street, Brisbane