

Virtusa helped a leading Asset Management Company to rewrite their Portfolio Rebalancing System

Challenges

- The team was using a proprietary VBA engine to manage the portfolio rebalancing process
- The existing MVP was not able to provide the portfolio managers with enterprise grade processes, features, compliance and audit reporting, integration, real-time data and automation

Solution

- Redesign the existing MVP which is scalable, reduces support efforts and supports audit reporting
- Moving the current VBA engine to a flexible architecture based on APIs and microservices
- Re-write existing UI to a modern single-page application using ReactJS

Value delivered

- Improved User experience
- Configurable parameters which can be used across different products outside Avantis
- Tracking changes to the model and parameters through Audit Trail
- Scale for new Products & Vehicles:
- Flexibility & Efficiency
- Establish Platform and re-usable patterns
- Reduce support costs