

Case Study

Enterprise Data Management Solution Increases ROI

Asset Manager's Success Story



THE CLIENT

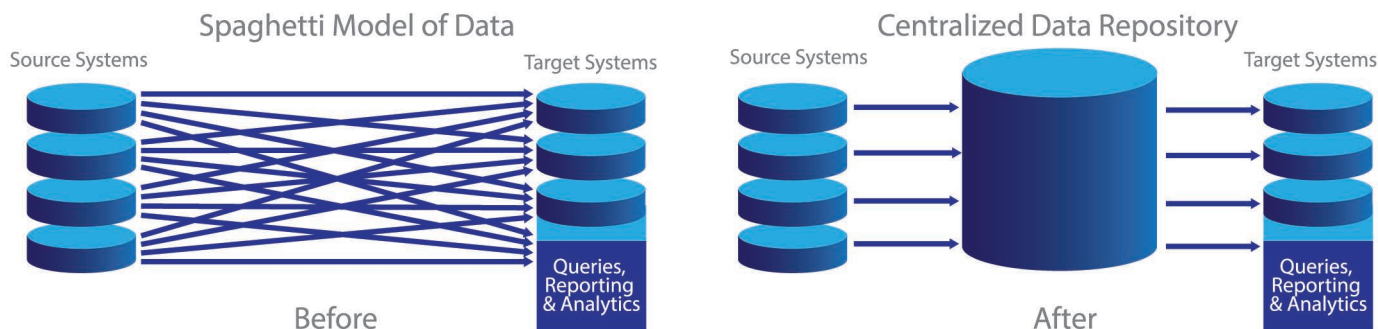
Global asset management firm based in Southern California with over \$180 billion of assets under management. The firm offers a range of investment products spanning across equities, fixed income, and alternative investments. Their data is stored in multiple systems, each with a different functionality such as CRM, trading, accounting, portfolio management, etc. They also rely on critical securities data from Bloomberg, Fitch, RIMES, and other third-parties.

CHALLENGES FACED BY CLIENT

Lack of enterprise view – The client had a “spaghetti model” of data rather than a centralized repository. This made it challenging to manage the various types of data, impacting the data quality, security, and their ability to adapt to changing requirements.

Siloed operations – The firm could not provide a unified view of essential information due to the inefficient data structure, causing inefficiencies and hindering cross-department communication and decision-making.

Lack of time and resources – The technology team was aware they needed an Enterprise Data Management (EDM) system, but was busy addressing short-term needs and lacked the resources to engineer the solution in-house.



SOLUTIONS

The asset management firm hired UB Technology Innovations (UBTI) to help reengineer their legacy data repository. UBTI's experts collaborated with the client to set up an efficient new EDM system tailor-made for their needs.

- The firm now has a flexible structure for users to query, report, and analyze data. This has improved users' access to relevant data and dramatically reduced turnaround time.
- The streamlined data management process increased the firm's ROI by reducing costs and boosting efficiency.
- The client has access to UBTI's around-the-clock production, maintenance, and operations support, which has enabled their in-house technology team to focus on transformational projects.