



MANTRA LABS



CASE STUDY

FROM SILOS TO SYNERGY

**Accelerating On-Demand Reporting with a
Next-Gen Data Lakehouse**



Overview

Our client, a Fintech firm offering digital infrastructure, asset and wealth management services are reimagining all the service flows, starting from customer onboarding to the way they manage complex activities like ***drawdown**.

Objective

As a key player in the asset and wealth management industry, the firm wanted to revolutionize its ***Registrar and Transfer Agency (RTA) services**.

*What is a Drawdown?

An important risk factor for investors that indicates how much an investment or trading account is down from the peak before it recovers back to the peak.

*What is an RTA?

An RTA records all the Asset Management firms' transactions, eg, Mutual funds, SIPs **Up to 100-200K for a cycle date**, etc. The RTA becomes the source of many reports provided to multiple external stakeholders, and the team uses many reports as part of service delivery.

The Need For Change

A DATA DILEMMA —

The company's diverse clientele, ranging from individual investors, asset management companies, regulators to distributors, generated a massive volume of transactional data (no. of transactions ranging from 2,000 to a whopping 500,000 daily).

This valuable data, spread across multiple, disparate systems, hindered efficient analysis and reporting.

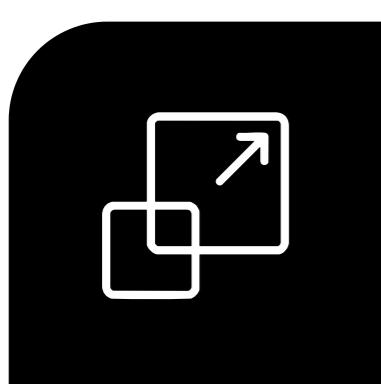


Key Challenges



Data Silos

Critical financial information was locked away in separate systems, making it difficult to access and analyze for generating reports.



Scalability Concerns

The existing system struggled to handle the increasing volume and complexity of data, impacting performance and hindering future growth.



Delayed Insights

Delayed reporting cycles hindered timely decision-making.



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BUILDING A DATA POWERHOUSE —

Mantra Labs is building a comprehensive **data lakehouse**, an AI/ML ready data platform that would gather all their data streams into one unified pool.

This data lakehouse wouldn't just store information; it would run analytics workloads, generate reports on-demand and empower analysis, simplifying the investing experience for everyone involved.

Benefits of a Data Lakehouse:

1

Centralized Repository

Everything gets consolidated into a single, easily accessible location.

2

Accelerate Insights

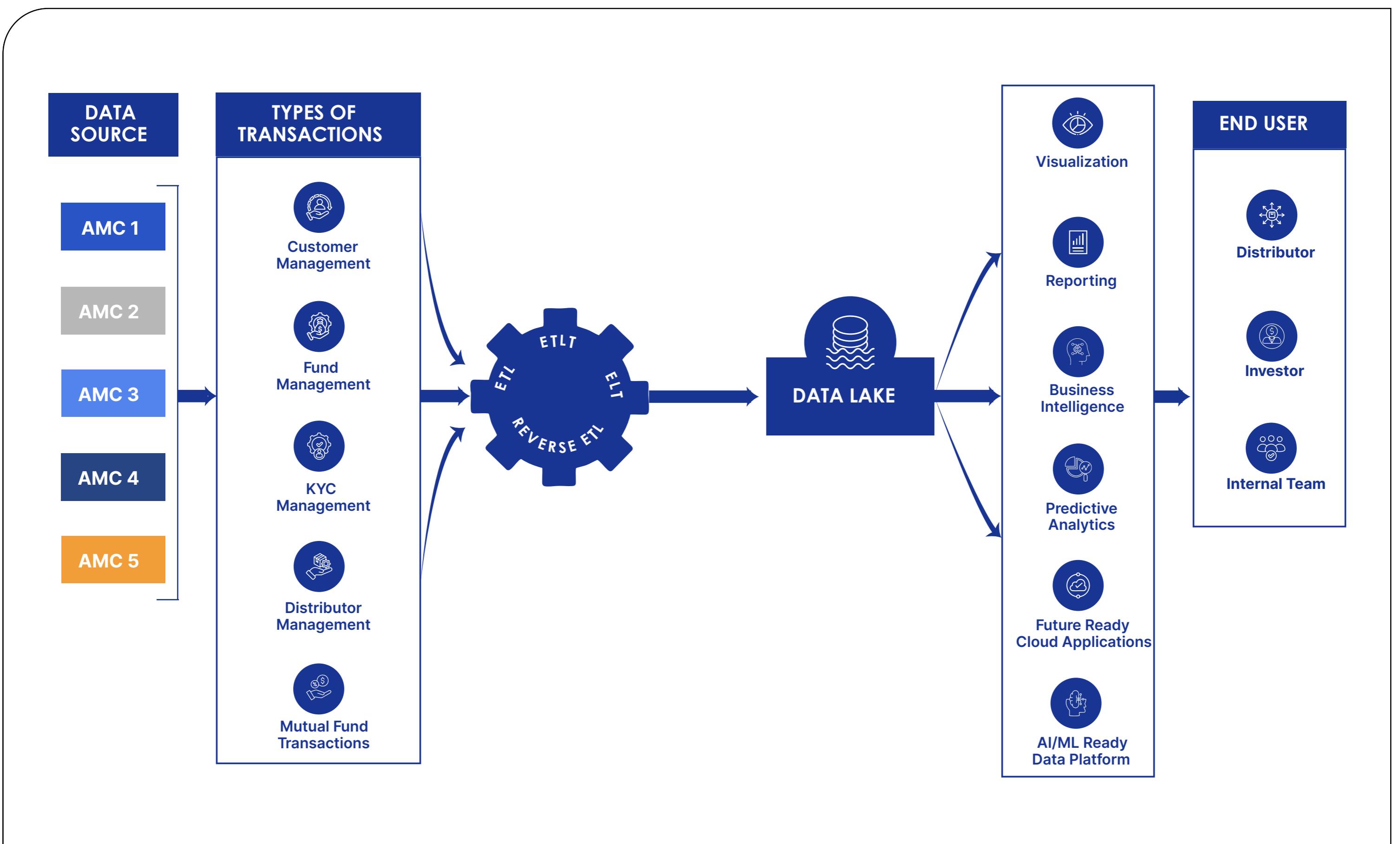
Rapid data analysis and reporting leading to quicker and more informed decisions.

3

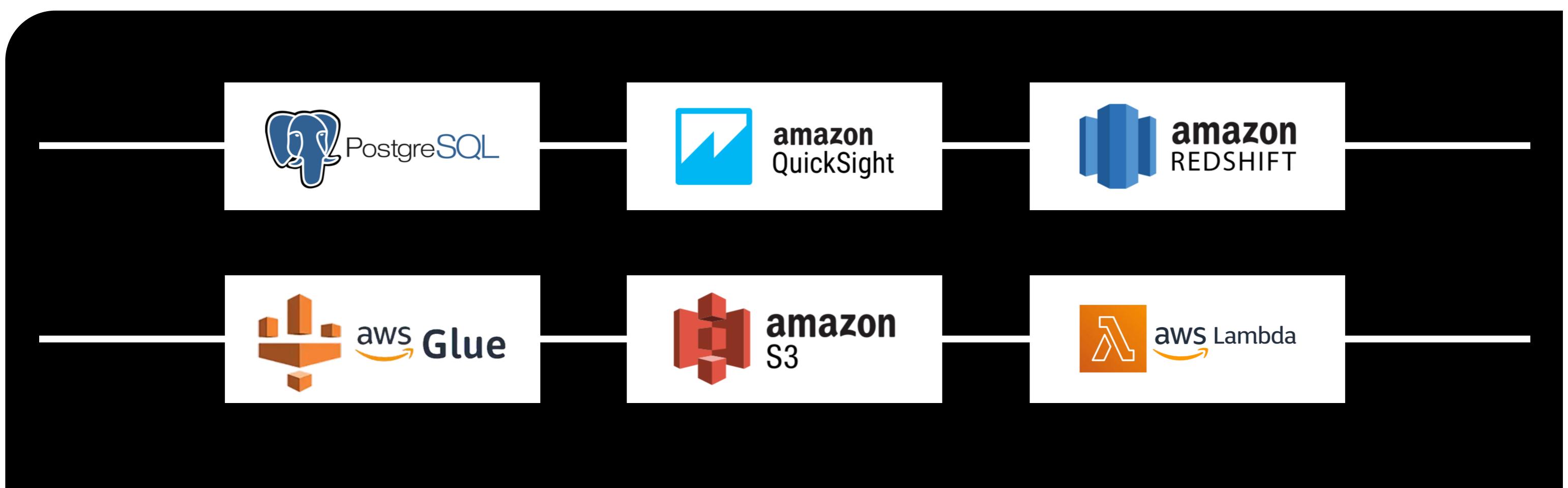
Enhance Scalability

A scalable infrastructure to handle more clients, transactions, and complex data.

How Does A Data Lakehouse Work?



Technology Stack

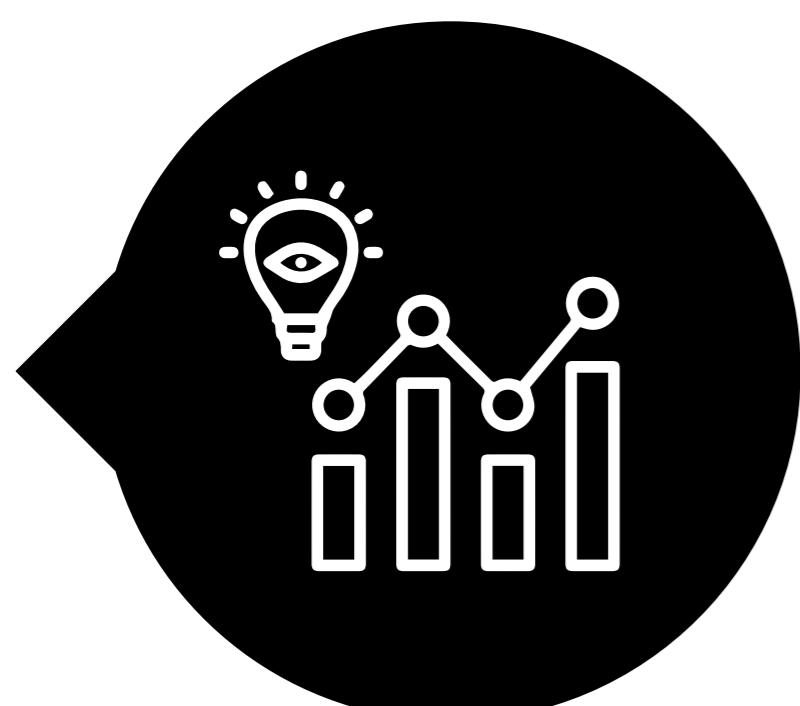


The Impact



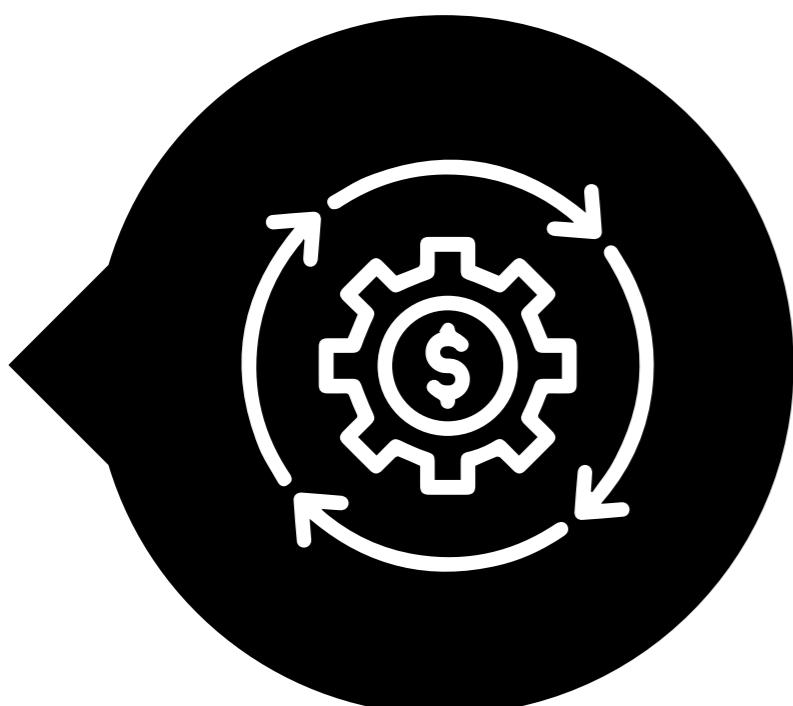
99.65% ↓ Reduction in Report Generation Time

Distributors are able to generate reports (sales & product, performance reports) that typically took **24 hours time, to under 5 minutes** (on demand bases get the report over email), and generate regulatory reports within an hour.



Achieved **3X** faster insights, enabling timely and informed decisions.

Investors and decision-makers can mitigate risks proactively, and make **data-driven decisions** with real-time insights.



Cost Effective Future Ready Platform

AI/ML-ready data platform, designed to adapt to evolving business needs at a fraction of a cost.

A photograph of an astronaut in a white spacesuit with red stripes, standing on a reddish-brown, rocky surface that looks like Mars. The astronaut is facing away from the camera, looking towards a large, partially illuminated Earth in the background. The sky is dark with some stars visible.

**ACHIEVE
OUTCOMES**

**THAT
MATTER**

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