

Our Client

The client is a large German bank with an investment-platform brand which is responsible for the order execution for investors. The platform aims with its offers to attract customers who want to make their investment decisions self-directed. Within the platform the user can buy stocks, bonds, funds, ETFs, warrants, certificates and securitised derivatives suiting his individual profile.

The Challenge

The client offers his customers a new digital investment service. The target group are people who have made first experience with investing and who are searching for an easy access to find the right investment products for their needs and risk profiles.

- Focus on winning new clients and servicing his existing relationships.
- Provide educated online clients with accessible, easy-to-use financial management tools.
- Fulfill Requirements of Investment Office, IT-Security and Marketing
- Allow fast, simple, straightforward investment opportunities for clients.

Our solution

Based on our Software Fincite Core, we built a solution where at first the customer defines his investment profile. On this basis, the customer receives a suggestion for an asset allocation that matches his profile. Within each asset class the customer chooses from a selected list of products and varies his allocation. At the end he receives information about his investments such as cluster risks.

The Web-Application Frontend has been programmed by the customer. Fincite parametrized the Algorithms that build the asset allocation, display the products and pushes back information to the Frontend of the Bank. The following Fincite Core modules have been used:

- Fincite.Manage
- Fincite.Allocate
- Fincite.Interact

