

### 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 trade stocks, bonds, funds, ETFs, warrants, certificates and securitised derivatives.

### The Challenge

To attract customers the client offers a tool allowing potential investors to capture investment opportunities based on trends, global drivers and trading strategies. Trend indices shall provide customers with important facts and insights, values of trends and their benefits to create investment decisions.

- Bringing on new clients and servicing his existing relationships.
- Creating a profitable business with clients who may have not gained a lot of assets.
- Scaling with new trends via a ongoing research approach.
- Meet the requirements for a secure, high-quality, cost-efficient platform.

### Our solution

With the use of market data provided by a Market Data Provider via Market Data Gateway (MDG) we run various analysis to proactively identify trends. The results are matched with a regular „manual“ research. The calculations are processed and given via API to the Market Data Provider which embedded the Frontend of maxblue.

Trendvest consists of three major components. Those are the identification of trend topics, the construction of an index (assets weighted as components of the indices) as well as the provision of various analytics and interaction potentials with the trends for the customer. The following Fincite Core modules have been used:

- Fincite.Connect
- Fincite.Interact
- Fincite.Save

