

Client Case Study

Popular Gestión enhances functionality and performance via Advent Office[®] module

CLIENT BENEFITS

- Seamless integration
- Improved performance
- Higher Client Satisfaction
- Powerful Architecture
- Long-term relationship

Popular Gestión, S.G.I.I.C is the Investment Funds Managing Society of Spanish Banco Popular Group, with a steadily growing volume in assets under management and specialized in SIMCAV's, besides own Investment funds.

Choosing Advent Office

Being one of the largest Investment Funds organizations in Spain, Popular Gestión was in search of a best of breed, international solution. Stability, performance, enhanced functionality and ease of use was the path to direct the company in choosing the Advent Office module, provided by Finvent in the Finvent Investment Platform (FIP) . The particular module met Popular Gestión's requirements, being a global, reliable solution with a complete package of efficiencies.

The scope

Popular Gestión's needs for a trade order and portfolio management solution pursued a well planned and effectively

completed project. The implementation process was successfully completed on time and on budget; system configuration and end user training was in-line with the project schedule which led to a streamlined process delivered in production, offering Popular Gestión a solution that automated its mission-critical business lines there on.

Seamless integration

With Advent's Moxy[®] module, Popular Gestión achieved a seamless integration between portfolio modelling, rebalancing and trade order management capabilities. Via its enhanced functionality and high-level architecture, Popular Gestión gained streamlined trading workflow.

"It was very important for us to acquire a system that would meet our trade and order management needs. Finvent provides us with a reliable, trusted, global solution that enables us to manage a large number of accounts and numerous investment instruments. With Moxy we have reduced manual work and now have great order management capabilities"

Miguel Colombás
Deputy Managing Director
Popular Gestión S.G.I.I.C. S.A.

Improved performance

Finvent's solution has proved to be a powerful part of Popular Gestión's intensive business engine. It has given traders an array of financial tools and capabilities that allow them to focus on trading rather than the process. The same way, due to Advent Office's straight-through-process automation, portfolio managers can focus on their client's needs, instead of wasting time with manual administration.

Higher Client Satisfaction

The every day increasing employee performance, in combination with the enhanced reporting and portfolio management capabilities had as a result more satisfied clients for Popular Gestión. Advent Office offers Popular Gestión a wide range of financial instruments that provide accurate results. Advent Office's extended, best-of-breed, multi-module portfolio management flow enhanced Popular Gestión's high level services offered, thus increasing client satisfaction.

Powerful Architecture

Advent Office has a strong, stable architecture that has enabled Popular Gestión to rely on for its front and back office processes. In addition, due to its

flexibility, Advent Office has proved to be an easy-to-use, every-day tool for Popular Gestión. As a result of its strong IT team and in collaboration with Finvent's certified consultants, Popular Gestión has acquired a strong internal knowledge that allows its IT to easily maintain and sustain the system.

Long-term relationship

In addition to a renowned, best-of-breed software solution, Finvent offers Popular Gestión reliable and knowledgeable service and support from experienced professional services representatives, thus establishing a long-term relationship between the two companies. In fact, while Popular Gestión initially chose Advent Office for its trade and order management business, over the years, the company reinforced trust in Finvent by acquiring additional modules of Finvent's Investment Platform.

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