

Client Case Study

British American reduces turnaround in customer service and increases business via Advent Office[®] module

CLIENT BENEFITS

- Flexible and easy client reporting
- Scalability
- Open architecture
- Friendly user interface
- Long-term reliable partner

British-American Asset Managers Ltd (BAAM) is part of the British-American Group of companies with offices in UK, Mauritius, Malta, USA, Bahamas and Kenya. BAAM was established in April 2004 and offers asset management and investment advisory services to individuals and corporate clients. The company is licensed as a Fund Manager by the Capital Markets Authority (CMA). BAAM aims to exploit emerging opportunities for fund management and investment services in East and Central African Region. It currently has the largest range of regional and offshore investment products.

Choosing Finvent

In order to become the preferred provider of superior investment management and related financial services, it was very crucial for BAAM to select a software solution that would absolutely fit their needs. Finvent, offering a State-of-the Art Investment Administration and Asset Management software, which is widely used by key fund managers worldwide, enables BAAM to leverage on Information Technology to

deliver first class service to its customers. "We chose Finvent for their reputable global track record of delivery and broad client base. With the solution that Finvent offers us, we have managed to automate our front, middle and back office covering all areas of portfolio management and customer service" says Mr. Duncan Wanjohi, BAAM MIS Supervisor.

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Dominic Kiarie
General Manager
British American Asset Managers Ltd

Initial needs and scope of business

Being a newly established asset management company, BAAM was in need of enhanced and automated client reporting, in order to reinforce its business by providing high-quality services to their clients. It was also crucial for BAAM to be able to track fund shareholders activity.

Flexible and easy client reporting

Finvent's Investment Platform (FIP) provides BAAM with a flexible, easy-to-use reporting tool that enables the company to customize

management and client reporting based on needs and specific requirements. In addition, the result offered is enhanced via high-impact graphics used for internal analysis and client presentation.

Scalability

One of the most important advantages that BAAM has gained with the use of FIP is the fast growth in its even growing market within only a few years. This is proven by the fact that the number of portfolios managed has grown from very few to several thousands, refining BAAM as one of the most reliable asset managers in its region. "The reality is that the Fund Management solutions APX, GLX and Moxy HAVE especially the ability to scripts and macros that have enabled us to automate; reducing our turnaround in customer service while lowering the "perceived" workload on the BAAM staff despite increasing business", adds Mr. Wanjohi.

Open architecture

FIP's refined architecture allows BAAM to interface to third party systems in order to achieve straight-through-process automation. This gives BAAM the benefit of less time on manual work, gaining efficiency and accuracy, while reducing operational risks and errors.

Friendly user interface

Being a very well-designed system, FIP offered BAAM an unprecedented ease of use. Working in a simplified, user friendly and sophisticated set up, users can now focus on their client needs, instead of spending time in complicated workflows.

Long-term reliable partner

What is considered of great importance for BAAM is Finvent's know-how and reliable support. "In short, everyone has been a winner. Every step of the way we have been comforted by the fact that the Finvent team

has been there for us 100%, with very positive attitudes." concludes Mr. Wanjohi. No matter what, users feel safe, having certified consultants dedicated to helping their customers. Feeling supported by Finvent's people is very important in order not to interrupt workflow or loose time. "We always try to offer quality products and services. Our expertise is the best reference of our company to our clients" says Mr. Makis Ioannou, Finvent Chairman and Managing Director.

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Duncan Wanjohi
MIS Supervisor
British American Asset Managers Ltd

Reference site

Finvent offered BAAM the solution and services that the company needed to gain continuous growth in its growing market. This has made BAAM a reference site for Finvent in many cases, starting with Bramer Asset Management Ltd in Mauritius, member of the British American Investment Group. Bramer provides investment management services, discretionary portfolio management and markets & distributes investment products. Finvent provides Bramer with the solutions that cover its complete workflow front-to-back and as a result Bramer has achieved to minimize costs while optimizing services offered.

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