Platform Securities

Front Office

Our Front Office system provides a flexible, user-configurable interface for portfolio and client enquiries combined with a fully integrated order management system designed to meet the needs of wealth managers, stockbrokers and fund managers.

Key Features

- Portfolio Management – portfolio modelling (including model of models), rebalancing and switching, risk monitoring, portfolio analysis and CGT What-if?. All fully-integrated, all real-time
- Order creation / entry / routing – Input, deal and track orders
- Automated dealing / automated execution - Best execution over multiple RSPs, limit order processing
- Corporate Actions – Track all actions and generate appropriate documentation; communications to clients about forthcoming events; and reflection of client choice in optional events
- Full-branded internet site - Consolidated view of client assets via web interface, easily configurable vanilla web site, account enquiry, news and charts, online dealing
- Real-time access - Real-time view of trade status
- Client inception – With workflow; allows new clients to be set up
- Comprehensive Enquiries – Access to client information and detailed “Know Your Client” functions

For more information, please contact us today.