Platform Securities

Wealth Managers

The Platform Securities solution enables you to focus on making the best possible investment decision for your clients. We provide you with an intuitive, user-friendly interface that gives you information at your fingertips, providing a powerful basis for structured investment decision making and client relationship management.

Once you have entered your investment instruction, you can just leave the rest to us. We will look after all aspects of trade execution and settlement.

Our total, single platform solution offers benefits to you and your clients. We provide you with:

- Real-time positions
- No system-to-system reconciliation
- Lower licence costs
- Reduced number of suppliers, lowering your management overhead

Our discretionary wealth management clients then provide a competitive, market-leading service offering to their own high value ‘retail’ customers. This scalability and flexibility enables them to enhance their service capabilities and deliver new product offerings, generating additional revenues and reducing operating costs.

Single, Comprehensive Solution

The system has been designed to support Portfolio Managers and Client Advisors with all the key functionality they require, including; maintenance and interrogation of ‘Know Your Client’ information; real-time access to client standing data and asset positions, together with a fully integrated capability to enter their own orders across a comprehensive range of financial instruments.

A full complement of decision support functionality is also available, including:

- The ability to rebalance one or a group of portfolios against a model
- Single and bulk order generation
- Pre-trade, real-time compliance guideline checking
- Asset allocation valuations
- Performance attribution against multiple benchmarks
- ‘What-if’ CGT analysis
- Portfolio risk optimisation
- The ability to monitor the status of all trades
- Full CRM functionality

For more information, please contact us today.