

# Fintech

An investment platform and financial technology company specialising in solutions for wealth managers, financial advisers, and institutional clients.



## PROJECT:

Development of an improved multi asset wealth management platform.

## TECHNOLOGICAL BASELINE

Wealth managers and advisory firms already relied on specialist platforms to manage client portfolios, meet regulatory obligations, and coordinate activities such as trading, tax reporting, and income management.

However, these systems were typically tailored to a limited set of asset classes or products supplied by a specific vendor, making it difficult to support the full diversity of instruments, markets, and workflows used across the wider asset management industry.

Publicly available knowledge on how to design a generic platform that could accurately handle different asset classes, each with its own protocols for trading, settlement, custody, and compliance, was limited, as most such systems were proprietary and closely guarded within financial institutions.

## TECHNOLOGICAL ADVANCE

The company sought to enhance fintech platform technology by extending its asset management software to support a broader range of asset classes and operational workflows within a single, secure environment.

Iterative research, development, and migration activities were undertaken to replace multiple third-party systems with an improved in-house platform, addressing challenges in integrating legacy services, modelling complex portfolio and income processes, and automating regulatory reporting.

The company conducted feasibility studies and experimentation into generic modelling and sequence management techniques so that the platform could accommodate differing third party data standards, regulatory requirements, and discretionary management workflows while maintaining accuracy, security, and scalability.

### About ABGi

ABGi is a professional services and consulting business, dedicated to helping UK companies accelerate and fund their innovation strategies. We help our clients unlock government incentives that fuel innovation. Our services cover a range of funding opportunities designed to support businesses at every stage of their innovation journey.