



## Flexible client reporting and Portal solution for Investment Management Industry.

Client reporting can be improved by focusing on: demonstrated Returns; control Risk; responsive to Regulatory requirements, better client Relationships. Inevitability of regulatory changes, fluctuating markets need reporting that is transparent, objective, and simple to instill confidence and trust in clients, helping cement client relationships. FlexPages is a Reporting & Analytics solution beyond Spreadsheets. Investment managers, who are frustrated with multiple systems and spreadsheets, need a solution that helps communicate effectively and efficiently with their Client/ Investor base. FlexPages solution streamlines complex and labor intensive portfolio tracking and client reporting functions.

**Technology:** Adobe Flex 3.0 & AIR UI, Java, Servlets, Spring, XML, MySql, Market Data API, Derby.

### **Key features:**

- Important information is aggregated at a single page views easier access and navigation
- Rich set of Interactivity and Analytical tools to compute data at varying time intervals
- Data visualization tools to gain deeper insights into Data sets
- Library of reporting templates with rich interactive features
- Advanced level data presentation features in terms of Pivot tables, Heat Maps ... etc.
- Ad-hoc reporting

### **Key functionalities:**

- Application has role based access levels and these roles include: Investment Manager, Investment Advisor, Broker, Investor
- Flexibility to organize and customize the user accessible pages/ functionalities.

### **Key Application Scenarios:**

- Investment Manager or Fund of Funds Manager providing reporting to clients either on real time or otherwise
- Investment Advisor accessing his client reports, Investment Manager reports, Prospective client tracking and acquisition
- Reporting to Senior Management with in a Investment Management House.
- Brokers ( Retail or Institutional) providing reporting to its clients
- Online Broker reporting to its client base on real time basis

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