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## Asset Management Dashboard

### OVERVIEW



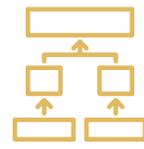
#### CHALLENGE

The Equities department of a global asset manager faced issues managing key departmental research due to the proliferation of data caused by MiFID II. They had limited tools to leverage new data assets and ensure that departmental research was being used efficiently.



#### SOLUTION

The client engaged a Treliant team to develop an Asset Management Dashboard to assist with the efficient management of key departmental research. The dashboard was developed using an agile approach, allowing for continuous feedback from users who did not have a full understanding of their requirements at the beginning of the project.



#### APPROACH

The Treliant team spent time with fund managers to understand the data and what insights would be useful. They wrote data cleansing scripts to standardize multiple data sources, set up and populated the underlying database. The team also ensured that all code was written in line with corporate standards and version control. The application's functionality and design were written and documented in Confluence to ensure its longevity and to provide handover materials for the in-house support team.

### RESULTS

- ✓ The Asset Management Dashboard allowed the Equities department to efficiently manage their research and associated assets.
- ✓ The dashboard made the large volumes of new data accessible to users.
- ✓ The use of agile methodologies allowed for continuous feedback from users, ensuring that the highest-priority needs were addressed first.