

Decision-layer enhancement turned existing investment data into *guided portfolio choices*.

A global asset manager · Investment & distribution · AI & machine learning · Data engineering & platforms

01 THE SITUATION

Business Problem

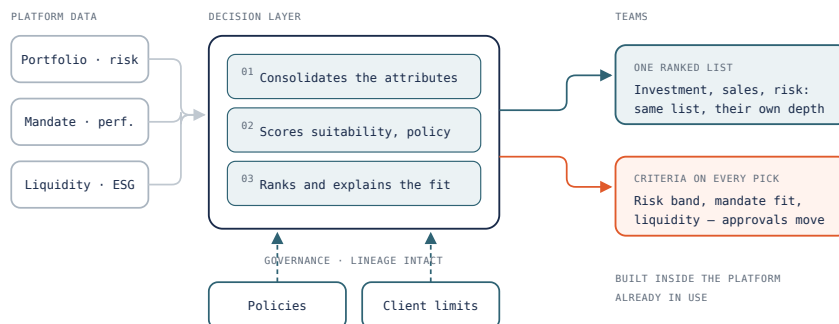
The platform already housed the portfolio, risk, mandate, and performance data teams needed, but those views were being consumed separately. As a result, “which portfolio is the best fit for this client or scenario right now?” still required manual comparison. The asset manager wanted portfolio selection to be guided, consistent, and explainable inside the platform itself.

02 THE CHALLENGE

We had to unite individual the platform’s data elements into a single, decision-ready view without breaking governance or data lineage. And at the same time, ensure that the recommendations being made by the solution honored investment policies and client/regulatory constraints.

03 THE SOLUTION

We built a decision layer inside the platform context that ranks and explains best-fit portfolios using existing the platform’s data.



IMPACT

25%

Reduction in manual comparison steps

15%

Faster portfolio-fit identification

32%

Better alignment between investment and distribution

CLIENT BACKGROUND

A global asset manager provides investment, advisory, and risk management solutions to institutions and individuals worldwide. The platform is its end-to-end investment and risk platform that unifies portfolio, trading, operations, and compliance data in one system so teams can analyze, monitor, and act on portfolios from a single source of truth.

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KEY COMPONENTS OF THE SOLUTION INCLUDED

- 01

Consolidated portfolio attributes

So that risk, performance, mandate, liquidity, and ESG could be evaluated together.
- 02

Suitability and policy-aware scoring

To surface only portfolios that match the defined client or strategy profile.
- 03

Role-aligned portfolio views

Present the same ranked list but with the level of detail each team needs (investment, sales, risk), eliminating conflicting recommendations.
- 04

Transparent selection criteria

Attached to every recommendation, showing the key factors met (risk band, mandate fit, liquidity), so approvals move faster.

WHERE IT LEADS

THE PRACTICE

AI & machine learning

Where this engagement was delivered, and where the work continues at scale.

dataprodukts.io/practices/ai-machine-learning/

START HERE

Data Platform Accelerator

The fixed-scope, fixed-fee engagement that starts work like this — scoped with you before you commit.

dataprodukts.io/starter-services/data-platform-accelerator/

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