

## Business Automation & Collaboration

Avanza's Business Automation & Collaboration solutions enable you to streamline processes and align your resources to create a consistent and enhanced experience for your customers.





Matrix is an Investment and Wealth Management Solution comprising a suite of integrated modules that support diverse investment operations. Matrix automates all areas and workflows of your operations ranging from direct investments and wealth management to offering investment products to affluent customers.

Matrix takes on all back office operations and settlements seamlessly with Core Systems and Financial ERPs thereby saving hours that go into processing information flowing in from the front desks.

## Highlights

- ◆ Total transformation of sales teams
- ◆ Operational harmony and transparency amongst units
- ◆ Maximize back office operational efficiency
- ◆ Launch new products and services with ease and flexibility
- ◆ Instantly define/modify fee structures
- ◆ Design Discount Policies as per market dynamics
- ◆ Regulate and automate Pre and Post stages of Direct Investments
- ◆ Review returns and execute exit strategies



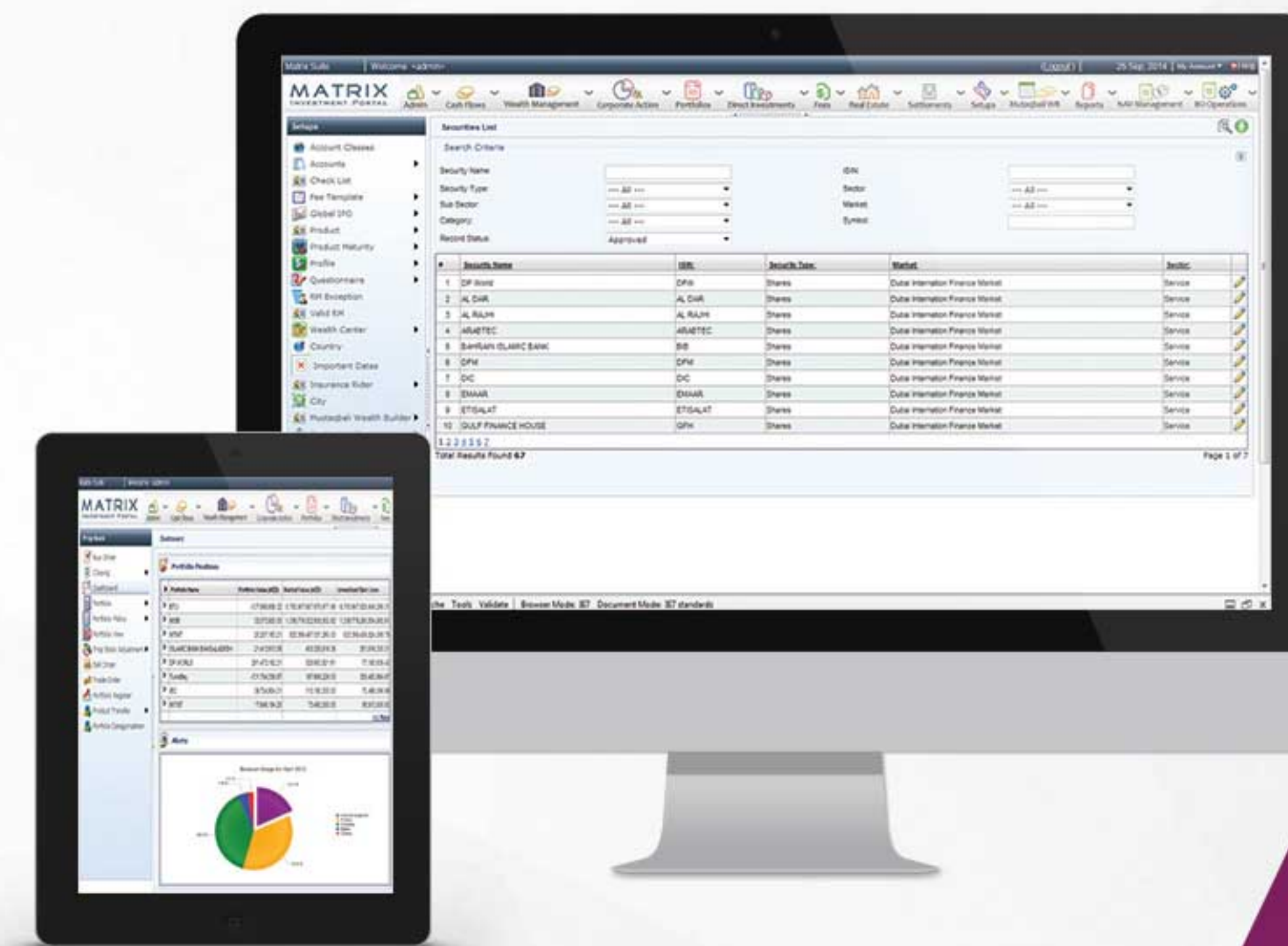


Matrix has been awarded the Best Financial Industry Application Runner-up Award by P@SHA Information & Communication Technology Awards in 2011.



## Features

- ◆ Upload or Define Asset Prices
- ◆ Detailed Search and Dashboards
- ◆ Straight-through Processing
- ◆ Complete Life Cycle of Trade Order Management
- ◆ Customizable Fee Templates Definition
- ◆ Easy-to-manage Complex Corporate Actions
- ◆ Real-time Portfolio and Holdings
- ◆ Alerts & Notifications
- ◆ Attachable Electronic Copies of Documents
- ◆ Seamless Integration with Core Banking Systems and Financial ERPs
- ◆ Multiple Bancassurance Products and Portfolio Management
- ◆ Facility for Managing Pledging of Portfolio Holdings
- ◆ Record Profit & Loss of Investment Products
- ◆ Support Multi-currency Products
- ◆ Integration with Active Directory
- ◆ Comprehensive MIS Reporting
- ◆ Integrated Solutions for Asset Managers
- ◆ Robust Sales Tools
- ◆ Integration Support with CRM and other Financial Applications



**Investments**  
*made smarter*