

A Business Solution for the Financial Services Sector

Optimization Enhances Returns, Reduces Risk and Creates Operational Efficiency

IBM Software Group

Portfolio Rebalancing



Solution Description

With sagging investor confidence, volatile market conditions and higher standards for accountability, the need for optimal asset allocation has never been higher. IBM's Portfolio Rebalancing solution is the technology of choice for investment and portfolio managers worldwide for enhancing portfolio returns while reducing risk and transaction costs.

IBM technology is widely used throughout the trade process cycle to automate and add decisioning capabilities to a wide range of applications in pre-trade, trade and post-trade for improved operational efficiency, regulatory compliance and customer relationship management. Recognized for its speed and mathematical accuracy, IBM's Portfolio Rebalancing solution is used for portfolio optimization, including creating tax-efficient portfolios, in-kind, crossing and financial planning.

Features & Benefits

The Portfolio Rebalancing solution provides advanced rule management and optimization capabilities essential for today's trading, investment and compliance requirements. With IBM, financial institutions are achieving unparalleled flexibility, functionality, speed and accuracy. Designed to handle large volumes of data and transactions in real time, the Portfolio Rebalancing solution provides a cost-effective way to enhance system and operational agility. Financial institutions can leverage their existing IT investments, from legacy systems to open technologies, as well as industry data standards.

Value Proposition

The Portfolio Rebalancing solution has a proven track record of delivering exceptional return on investment to its customers. IBM provides complete services for consulting, education and customer support. Best practices and a proven methodology, coupled with professional, expert support, help customers reduce development time, cost and risk.

IBM Segment

- ILOG Optimization

Business Function

- Asset Allocation

Target Industry

- Banking and Financial Markets

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