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Supported platforms: Linux®, Macintosh, Windows®
Vertical markets: Financial Services

Adobe products supported



SOLIAM, THE ASSET MANAGEMENT SOFTWARE

Typical Customer Scenario

With more than 10 year's business experience, a proven technological expertise and top level business experts, BSB publishes "state of the art" software packages such as Soliam, **its solution for asset management**.

The asset management business is a very challenging and highly competitive business that is always changing and that is ruled by performance. This is why each asset manager needs, at any moment, to have the **right information to make the right decision**.

It is with this situation in mind that BSB has chosen to develop the new version of Soliam using the Adobe Flex technology. Indeed, with the high level of **interactivity and customization** that Flex introduces, each asset manager can select only the information that meets his **specific business needs!**

Challenges solved with the solution

Nowadays, the amount of information that can be gathered in an asset management application such as Soliam is tremendous. The main challenge for asset managers is to have access to the **right information** at the **right time** to be able to make the **right decision**.

This challenge can be solved with Soliam which enables asset managers to easily select the specific information needed. In practice, this means that each asset manager can, **at any moment and all by himself, define, customize, save and share his own consultation and trading screens**. We can hence say that Adobe Flex enables the Soliam software package to become a kind of tailor-made solution.

By enabling this level of customization, Soliam offers asset managers a complete new ergonomic experience allowing them **optimizing their day-to-day activities** and helping them in their decision making!

Customer benefits / ROI / Results

Soliam optimizes the asset managers' experience mainly through the following features:

- A fully configurable interface
- Dynamic content management and customizable screens
- Optimized accessibility via both Intranet and Internet access

The upgraded Flex version of Soliam is **ergonomic, customizable and evolutive**.

By providing the same standard functionalities as traditional desktop applications, Soliam enables asset managers to work in a more efficient and less time consuming way!

Edgard Gassino, General Director of Adobe West-Europe declares: "Adobe strongly believes in the development of 'Rich Internet Applications' within the financial sector. Our partnership with BSB clearly illustrates our common objective which consists in offering our clients ergonomic, customizable and evolutive solutions. Within today's financial world, these three features stand for efficiency."

Client testimonial – Carmignac Gestion

In order to offer its clients optimized tailor-made advice, Carmignac Gestion (Paris) has selected Soliam, the asset management software of BSB.

The asset management activity of Carmignac Gestion offers both discretionary and advisory portfolio management to its more than 2 500 – mainly French – clients.

The financial performances realized by Carmignac Gestion are remarkable. The company is therefore considered as one of the leading asset management companies in France.



The new version of Soliam has been upgraded in Adobe Flex

Carmignac Gestion Privée offers its clients personalized tailor-made advice given by a dedicated advisor, who is also an expert in financial markets. The offered solutions are always in accordance with the client's wishes in terms of investment period and risk profile while taking into account the client's specific situation.

Moreover, Carmignac Gestion wants to offer its clients complete transparency and full information so they can follow the performances of their portfolios. This transparency has been put in place through regular reporting and via remote access to a specific website, available to all its clients.

To achieve these objectives, Carmignac Gestion needed a portfolio management tool allowing to personalize its relation with each one of its clients and to offer individual reporting.

In order to select the best solution, Carmignac Gestion has taken into account mainly the following criteria:

- Availability of an environment specially developed for the wealth management advisors for a more efficient daily management of their clients (client satisfaction, improvement of the selling processes and increasing prospection potential),
- Extended client reporting possibilities and autonomy to access and use the data centralized within the tool – management assistance, internal and external reporting (quality and modularity),
- Availability of a module for the management of standard formalities through the assistance of a Wizard (Wizard for creating new clients/prospects, for opening accounts, for managing MIFID regulations based on procedures defined by the person responsible for the observance of regulations and for the internal control),
- Tool able to communicate with an important number of external financial providers and allowing an increased interaction between the wealth management solution and the rest of Carmignac's infrastructure (access to client website, exportation towards Excel and pdf, sending of emails, management of telephone calls),
- Remote access for all the clients through an ergonomic interface,
- The significant improvement of the steering of the activity: multicriteria analyses of the outstanding loans, revenues, return, etc.
- A software publisher with excellent references (reference meetings have been organized)
- A software publisher with a sound financial position as a guarantee of stability.

After having compared publishers in the course of 2007, Carmignac Gestion has chosen BSB's Soliam software to replace its previous management tool.

You can find the complete version of this testimonial (approved by Carmignac Gestion) on the website of BSB (www.bsb.com).