

Case Study



Consulting

Building a High-Performance Trading Platform for a Global Financial Firm

Building on a decade-long partnership, Judge Consulting was engaged by a global financial trading firm to design, develop, and implement a state-of-the-art solution trading application to execute, track, report, and audit trades. The new system provided the client with enhanced operational efficiency, greater scalability, improved security, and reduced dependency on costly third-party systems.

THE CHALLENGE

Overcoming Third-Party Dependencies and Scaling Trading Operations

As a part of their digital transformation, the client, a global financial trading firm, was looking to continue to build out their trading systems. They had already worked with Judge Consulting over the past decade-plus to transition from complex Excel spreadsheets to a custom-built application to manage daily trading analysis operations as well as enhance reporting capabilities. While this innovative solution greatly improved operational efficiency, compliance, and reduced exposure to human error, the client was still reliant on costly third-party systems for the execution, tracking, and reporting of trades. The client needed a secure, high-volume trading application that met regulatory requirements, integrated seamlessly with existing systems, and featured an intuitive interface for analysts at all experience levels.

THE SOLUTION

A Custom, Scalable Trading System for Execution, Tracking, and Compliance

Judge Consulting was engaged to further the client's digital transformation with a comprehensive, efficient, and scalable trading system that seamlessly integrates with the client's existing platforms. The solution needed to complement the other trade analysis system and the custom-developed system for aggregating trade data and recommendations. Judge's solution will be utilized to execute, track, report, and audit trades pushed from the client's other systems.

To address these needs, Judge Consulting developed a solution with six key features (*details on page 2*). Judge Consulting also provided change management and user training to ensure a smooth transition and help users understand the application, functionality, and how it integrates into workflow.



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Trading System Features:

Enhanced Functionality: The application features advanced trading algorithms, robust risk management tools, and comprehensive reporting capabilities, account / portfolio optimization and rebalancing (analysis, creation of proposed trades), tax transition analysis, “what if” analysis, intelligent search, integration with order management system (OMS), and trade reconciliation (compare proposed trades with actual trades and fund accounting systems).

Compliance and Auditing: Extensive auditing and compliance functionality, including trade history, account messaging, point-in-time historical tool and report snapshots, and long-term backup to cold storage archive.

Scalability and Performance: Optimized to handle high volume trading activity and complex transactions. System architecture is built to enhance scalability and leverage the latest technologies for peak performance.

Seamless Integration: The platform integrates with the client’s other systems, interfacing seamlessly with existing platforms for greater operational efficiency, including a third-party order management system (OMS) for execution of trades.

User-Centric Design: A redesigned intuitive interface makes it easier for veteran and novice traders to navigate the system, access critical information, and execute trades efficiently.

Robust Security: Advanced security protocols to protect sensitive data and ensure compliance with industry regulations, including robust authentication mechanisms, data encryption, and continuous monitoring for threats. All functionality including the portfolio optimizer, are hosted on the client’s private cloud in Azure.



“The Judge Consulting custom-built trading platform remains at the forefront of technology and evolving industry standards.”

THE RESULT

Seven-figure Cost Savings Annually, Greater Autonomy, and Long-Term Success

The Judge Consulting custom-built trading platform remains at the forefront of technology and evolving industry standards, managing over \$30 billion in assets for the client. By developing, integrating, and incorporating the new trading system, the client gains valuable autonomy and ownership over their business while reducing reliance on costly third-party systems. The client realized seven-figure savings per year due to the new application and their ability to move on from third-party systems. Additionally, efficiencies between all company systems and seamless integrations have improved operational workflows and data transfer across platforms. Each of the Judge-built systems continues to serve the needs of different groups of asset managers and position the organization for success in the future. Judge continues to support the client and their systems with regular maintenance and support as well as continuous improvements and enhancements based on the ever-evolving role of technology in the financial services industry.

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