sowatec
smart solutions for finance

News – March 2014

■ **Credit Suisse implements calculo for billing a new service for institutional investors.**

In addition to traditional wealth management mandates, institutional investors want solutions that allow them to act on their own investment decisions using Credit Suisse investment building-blocks. Credit Suisse offers them special funds which focus on equity, fixed income, multi-asset class and passive investment strategies. With the successful "Institutional Fund Access" platform, clients are free to choose their own building blocks and benefit from competitive fees, based on product charges and a volume discount structure. Credit Suisse uses calculo to compute fees and issue invoices. The decision was based on the institution's positive experience with another Sowatec solution, and on the calculo approach, which provides modules that can be customised, while still allowing a high degree of automation.

The kick-off for the pilot phase took place on 25 April 2013. The software was installed in late December 2013 and was successfully used for real fee calculation the first time in February 2014.

■ **Sowatec`s tandem to get a performance boost - new employees in the saddle**

The new year has gotten off to a good start, and not just in terms of business. Internally, things are rolling smoothly as well. The Sowatec tandem has now been extended with the addition of three saddles.

As a project manager and business consultant, **Alexander Goerger** is in the steering position.

As a technical project lead, **Daniel Brugger** chooses the right equipment for the terrain.

We still have positions open for application consultants/business analysts and a software engineer (Java /. NET) with an interest in technical project management. More under www.sowatec.com

Sowatec news highlights

■ Allianz Global Investors: You can read the success story of the pan-European trailer-fee project with calculo at www.sowatec.com under "List of customers."

Sowatec portfolio highlights

■ Launch of integrio, the agile solution for data integration and quality management.

What integrio can do: integrio controls complex data flows from integration to analysis. Checks all data for format, plausibility, quality, and sequence. And ensures fully automated and quality-controlled data transfer, which guarantees effective charges and management processes.

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