

Linedata Longview OMS Suite

Optimized portfolio management, trading & compliance



Award-winning order management solution provides a highly configurable set of tools to streamline your portfolio management, compliance, trading, risk, and decision making.

Real-time insights across the investment lifecycle help you quickly identify and respond to opportunities.

Our modular platform reduces cost and operational risk, driving efficiencies. With Linedata Workstation, our extensible, widget-based framework you can view, interact, and take action based on insights from all the information stored within your Linedata front-office platform.

We help you optimize portfolios, seamlessly integrating hundreds of trading destinations, and supporting you with agile technology that evolves as your business does.

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Our partnership with Linedata gives us enhanced order management tools, integration with partners, and workflows that will reduce risk and add efficiencies benefiting both Aperio and our clients.

Patrick Geddes
CEO and Chief Tax Economist, Aperio



Portfolio Management

- Asset allocation management / modeling
- Rebalancing
- What-if analysis
- Cash management
- Performance analytics
- Risk monitoring



Trading

- FIX connectivity (via Linedata Lynx)
- Integrated broker algorithms
- Execution management
- Pre-trade and post-trade analytics
- Matching, confirmation and settlement
- Commission management



Compliance

- Pre- and post-trade compliance
- Parameterized rules
- As-of compliance
- Disclosure services
- Reporting



Take advantage of a solution built for your business



Single Multi-Asset Trading Platform

Provides extensive portfolio management, compliance and trading capabilities across all asset types. Includes electronic trading for fixed income and derivatives.



Linedata Workstation

Easily create visually rich, exception-based views tailored to your business operations. See and act on critical information in a single view.



Advanced Portfolio and Cash Management

Superior portfolio and cash management capabilities support different investment approaches and management styles.



Extensive Electronic Trading Connectivity

STP trading capabilities across all asset types. Coupled with our fully managed connectivity service, Linedata Lynx provides access to 600+ global brokers and 60+ integration partners (dark pools, broker algorithms, analytics, post trade).

About Linedata

Linedata asset management solutions offers a robust, configurable platform of software, data and services that enable our wealth, institutional and alternative clients to grow, operate efficiently, manage change and provide excellent service to their own clients and stakeholders. With over 20 years' experience, Linedata delivers humanized technology that empowers leading asset management and credit industry firms worldwide to evolve and operate at the highest levels.

700+ clients

50+ countries

1,300 employees

20 offices

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