



## Reimagine your operations. Transform how you do business. Get more out of your day with optimized investment operations

How does your team manage the complexity of today's investment operations? If pressures in the form of new products and strategies, larger numbers of portfolios, and growing investor demands sound familiar, Linedata can help.

Everything about Linedata's OMS and Trading Solution is designed to streamline and simplify investment activities and open up time to focus on growing your business.

Our modular platform combines two decades of battle-tested buy-side experience with a configurable toolset, automated workflows, and remote access dashboards that alert you and enable action in real time for core functions like rebalancing and trade approvals, individual client views and time sensitive opportunities.

### The Linedata difference

- We are buy-side experts with 20 years of partnering with over 300 global clients, helping transform their investment operations.
- We give you the advantage of working with an independent, global partner who is not owned by a ratings agency or bank.
- Our approach is as flexible as our technology – we understand that adaptability and expert support is paramount.

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*"Linedata's offering is perfect for us because its high-performance, customizable platform gives our company the flexibility and scalability to meet the growing needs of our customers."*

**CEO, Wealth Manager \$30B+ AUM**

## Business benefits

### **Optimize workflows, get insights anywhere you are**

Highly configurable tools streamline investment operations and automate complex portfolio workflows.

OMS account level information, real-time insights and data intelligence accessed anywhere let you quickly identify and respond to opportunities.

### **Access robust multi-asset OMS and trading**

Support across assets and strategies, including crypto and ESG, let you focus on effectively running your business.

Access the latest web-based Broker Algo Suites and interactive Algo catalogue at your fingertips.

### **Enhance what makes you different**

Configurability and API innovation are in our DNA. We leverage modern APIs with a deep ability to integrate and configure our Linedata Longview (OMS) with your own and external systems.

We are a technology partner that empowers your next stage of growth while enhancing the operating model that made you successful.

## Take back time to grow your business with more efficient investment operations.

### **Manage portfolios effortlessly with Linedata Accumen**



- Works seamlessly with Longview, delivering on-the-go access to real time portfolio data, rebalancing, pre-trade compliance and trade approvals
- Easily handles large numbers of portfolios: construct, organize & update models
- Interactive dashboards and alerts provide holistic view of accounts and investment activity
- Highly scalable, optimized throughput for large numbers of accounts

### **Enhance portfolio workflows**



- Access intuitive asset allocation, what-if analysis, and cash management; performance analytics and risk monitoring

### **Access built-in ESG data and scoring**



- Arabesque S-Ray puts UN Compact scores into Linedata Longview at no additional cost

### **Rule the rules with Linedata Compliance**



- Fully automated, highly scalable pre-and post-trade solution
- Parameterized rules, 'as-of' compliance,
- Disclosure and reporting services
- Increase transparency and efficiency for any compliance operation

### **Benefit from the cloud**



- Hosted, hybrid or public
- Aligned with your internal strategy

### **Ensure trading outcomes and time to market**



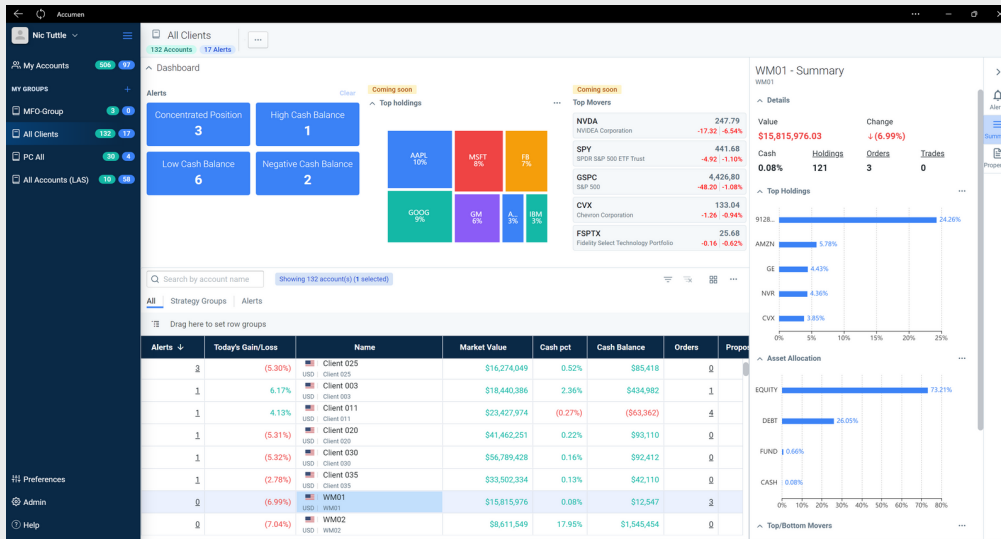
- Modern trading screens, UX, and performance
- Pre-and post-trade analytics
- Execution management
- Access Web-based broker Algo Catalog in seconds

### **Make better decisions with new insights from operational data**

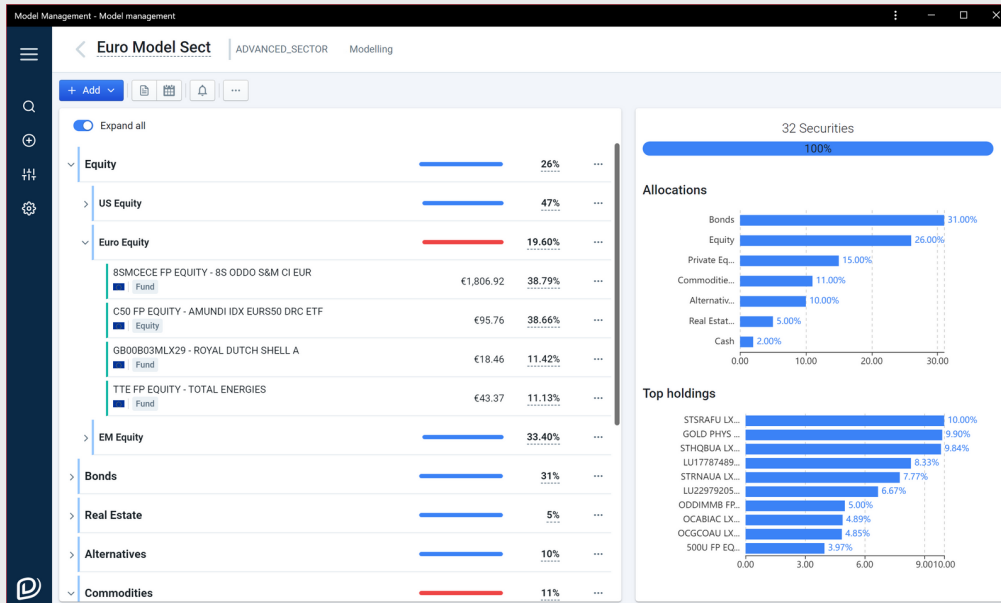


- We leverage your own data with machine learning tools to provide you with predictive business intelligence
- Manage trade errors, compliance breaches and client attrition among other scenarios.

We are constantly creating new ways to optimize your investment operations, supporting you with adaptable technology that evolves as your business does.



Benefit from Linedata Accumen's streamlined workflows and remote access dashboards



Easily review, update and add new model targets with Model Management

## Linedata Asset Management

We offer 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.

## About Linedata

With 20 years' experience, Linedata provides global humanized technology solutions and services for the asset management and credit industries that help its clients to evolve and to operate at the highest levels.

**700+**

clients

**50+**

countries

**1,100**

employees

**20**

offices

### Visit [linedata.com/OMS](https://linedata.com/OMS) and Trading

Explore our other asset management solutions:

- [Linedata Compliance](#)
- [Linedata Analytics Service](#)
- [Linedata Fund Services](#)

✉ To speak with us or book a demo, please contact [getinfo@linedata.com](mailto:getinfo@linedata.com) or [visit linedata.com](https://linedata.com)