GAMBiT

Innovating for a healthier financial future

Discretionary Portfolio Management

Support investment managers in their day to day

Customization

Automation

Mass Rebalancing

AI explainability

1 / Your business challenge

The banking industry is evolving rapidly as consumers demand personalized services, flexibility, and tailored investment options. This shift challenges teams to not only deliver impeccable services but also innovate to meet these rising expectations effectively.

How can we ensure a quick response to market fluctuations?

How can we guarantee transparency and regulatory compliance of our investments?

How can we personalize investment strategies according to our financial goals?

How can we provide quality advice for retail while minimizing commercial time?

2 / Solution Benefits

Automated investment solution, where cutting-edge algorithms make execute financial operations on your investors' behalf using the power of algorithms to offer personalized portfolios to investors, with maximum flexibility.

The main features are:

Optimized Portfolio Construction

Leverages quantitative and rule-based engines to determine optimal target allocations tailored to customer preferences, goals, and current portfolios.

Comprehensive Virtual Account Testing

Allows users to create virtual accounts to test rebalancing and performance calculations before committing to a real account, ensuring informed investment decisions.

Dynamic Rebalancing

Ensures portfolios are consistently realigned with their target allocations, using configurable rules and triggers to maintain investment objectives.

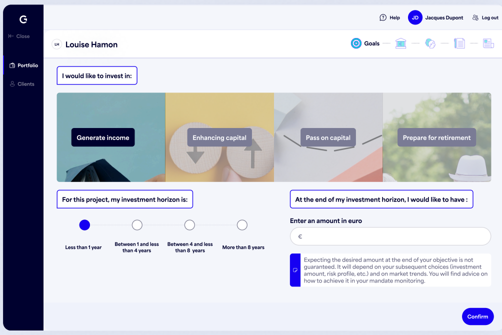
Personalized Recommendations

Captures finance and ESG preferences and use them to customize allocation recommendations

3 / Customer journey

Throughout this DPM journey, the consumer transitions from selecting a service to the onboarding and ongoing management of their investments, ensuring their alignment with the financial goals.

Define your investment objectives by identifying your goals, specifying the amount you wish to invest, and determining your time horizon.



Retrieve profiling information to ensure your investment goal aligns with your profile.

Set your investment preferences.

Analyze the proposed allocation for your investment portfolio.

Keep track of your investments using a dashboard.

4 / Why Gambit ?

Comprehensive toolbox

All the building blocks for the creation of a self-guided or advisor-guided investment advisory or Portfolio Management service.

Fast implementation

Using state-of the art technology, including an API-first approach and cloud, it is possible to combine re-use of modules with transparent integration both in the front (screens) as back (data).

Global mutualization, local configuration

All modules have been designed to support multiple use-cases, by allowing a local configuration for your specific workflow. The multi-tenant architecture allows for a secure separation of data and contig.

5 / Use case

Need some hands on experience before making a decision?

BNP PARIBAS
La banque d'un monde qui change

Context

The digital transition was crucial for BNP Paribas to reduce operational costs and enhance efficiency across its operations. A significant challenge lay in striking a balance between digitalization and maintaining the personalized approach that customers expected from a leading financial institution. Initially, disparate tools were employed within various teams to manage different services and offerings.

Our solution

Our solution empowers teams across BNP to deliver enhanced services by enabling them to:

Customize various parameters of their mandate and simulate the mandate before subscribing

Optimize their choices by emphasizing the digital aspect of the offer and leveraging new technologies.

Strengthen portfolio management through significantly enhanced data processing capabilities.