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M-Advise, an HCL Domino App, Drives Delivery of Greater Investment Options for Marzotto Sim Customers

Personalized investment options

Accessible online allowing work from anywhere

Calculated risks yields smart guidance

Company: Marzotto Sim
Industry: Financial Services
Products: HCL Domino
Partner: Digiway

Challenge

Marzotto Investment House needed to efficiently manage a large number and wide variety of investment portfolios, while ensuring the content was contractually compliant.

“M-Advise, our HCL Domino web app, provides our asset managers more efficiencies in providing the best personalized investment options for our customers.”

Solution

M-Advise® is a web app that creates an individualized investment plan and successfully manages and monitors the lifecycles of customer investments.

— Jacopo Ceccatelli
CEO Marzotto Sim

Result

With the M-Advise app, the asset managers can efficiently and securely work from anywhere and provide customers investment options tailored to their portfolio characteristics.

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Smart Investment Options

Marzotto SIM is an investment house with innovation at its core. It is driven by a management team whose consolidated experience and significant track record in the wealth management and capital market sectors is recognized by leading national and international financial institutions and consultancies.

Marzotto Sim is known for its strategic and operative independence. It is supported by private and institutional shareholders which ensures its long-term stability.

Being world-renown experts in the financial sector, Marzotto is tuned into closely track evolving investment opportunities in the market. And as those opportunities became more sophisticated and varied over time, it wanted to make sure that the tool its asset managers used to interact with their customers was modern, efficient, accurate, easy to access and kept the management team in lock-step with the industry. Most importantly, the tool needed to be fast to analyze the financial data and determine how that information would best fit with the characteristics of each customer's personal profile so that the very best, tailor-made investment options could be offered to customers.

Transforming the Experience

It was during this time that Marzotto engaged with trusted business partner, Digiway, to develop and deploy M-Advise®, a web-enabled application based on HCL Domino. It took a few months to develop, test and deliver and has been in continuous enhancement mode, as the financial landscape evolves and adjustments are needed, since 2017. It has been successfully used, on a daily basis, by their asset managers worldwide since it was first deployed. The app is core to meeting the financial needs of current and new customers and is helping to drive their overall business forward. And because it's web-enabled, business can be conducted anytime and from anywhere.

The Road Ahead

The intelligent M-Advise app has been a great success. It allows asset managers to have an overall and ongoing view of customer portfolios so they can easily see where investment adjustments should be made along the way to improve the return on their customer's investment.

M-Advise has substantially increased the efficiency and productivity of the asset managers and reduced the financial risk related to investment options because the data is current and accurate.

Looking ahead, Marzotto will develop additional HCL Domino apps as new business needs arise, but currently the focus is on expanding the functionality of M-Advise and watching its success grow across the team and positively impact their revenue bottom line.

About the Company

Marzotto Investment House an investment brokerage firm authorized by the Bank of Italy, offers services of: capital markets, asset management (through the subsidiary Marengo Financial Services Ltd. based in London), research and advisory. The executive management is made up of professionals who have decades of experience in both Italian and international management companies and business banks.

See four examples of the HCL Domino app, M-Advise, in action (Italian):

Marzotto "M-Advise" Gestione Clienti

Marzotto "M-Advise" Portfolios

Marzotto "M-Advise" Gestione Securities

Marzotto "M-Advise" Trading

About the Business Partner

Digiway is an HCL Business Partner with competencies to the HCL Domino software from older versions to newer ones with the constant updating of knowledge and technical certifications. They install and configure Domino solutions of any size and complexity, taking care of the subsequent management advice at customers with the ability to remotely monitor the infrastructure.

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To learn more about HCL Domino, please contact your HCL representative or HCL Business Partner and schedule a demo.

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