



Wavicle Case Study

Large Financial Institution/Bank

The project was conceived to automate the Optimized Portfolio generation process; the requirement was to deliver the Optimized Portfolio to the trading team via email in Excel format in a short time window, based on triggers and data inputs from various points in the trading system. Automation required standardization of data which was residing in multiple sources.

We designed the solution with MicroStrategy Narrowcast system. The Business rules & Data standardization were integrated into a stored procedure in Oracle. We used pre/post SQL option in MicroStrategy to trigger the stored procedure. We used the Dynamic Subscription option in Narrowcast to kick off report generation as soon as the trading system thresholds were met. Macros in Excel were added to format & highlight the changes.

The project provided the desired automation with 98% reduction in lead time. The optimized portfolio reports were generated and delivered in under an hour as opposed to a two hour requirement.