

Data Visualization Solution enhances Capture of Dynamic Market Sentiments



Industry

Stock Broking/Securities

Overview

Stock markets around the globe have become more dynamic than ever. Stock Broking firms need real-time analytics to spontaneously capture the varying market trends. Fortunately, Data Visualization solutions can generate quick reports from voluminous data to help anticipate market sentiments.

Self-Service Business Analytics for leading Indian Stock Broking Company



Client

The Company is the subsidiary of world's largest bank based on market capitalization, dealing in securities and stocks investments. It provides services in all major areas of investment like equity, IPO, derivatives, mutual funds, insurance etc.

- Restricted and inflexible data visualization reports resulted in poor interpretation of data
- The system compromised on security aspects and had high IT support dependency
- Lack of effective versatility to do ad-hoc analyses from multiple viewpoints

Business needs

Being a part of an extremely dynamic industry, tracking the slightest market development is of highest priority for the client. They needed a solution that could enable them to react quickly to the varying market trends.

A solution that would be able to generate hassle-free, ad-hoc & secured reports that could provide accurate data visualization.

Datamatics' Solution

Datamatics selected Tableau, a leading Data Visualization BI tool in the market. As per requirements gathered, various Dashboards and Reports were designed for various levels:

CXO Cockpit

- **Top Management Dashboard:** Solution specifically tailored to the CXOs requirements
- **Branch Manger:** Scanned reports consisting of tabular data along with appropriate graphs/charts
- **MIS Team:** Developed and demonstrated different types of meaningful reports and business cuts
- **Customer Service Executive:** Business critical reports with the details of the prospect customers

Challenges

- Unable to react quickly to market developments and regulatory requirements
- The existing system had a high turnaround time which delayed the overall decision making process

Datamatics' Advantage

- Global Information Technology (IT) & Business Process Management (BPM) organization taking you forward on your route to Digital Transformation
- Trusted partner to several Fortune 500 companies globally
- Capabilities built around technology, domain expertise & knowledge of business processes
- Alliances with global technology leaders such as Microsoft, IBM & EMC²
- More than 7,500 employees globally
- Certified for SEI CMMI Level 4 V1.3, ISO 27001:2013 & ISO 9001:2008
- SSAE 16 compliant processes
- Global presence: U.S., UK, Australia, Dubai & India

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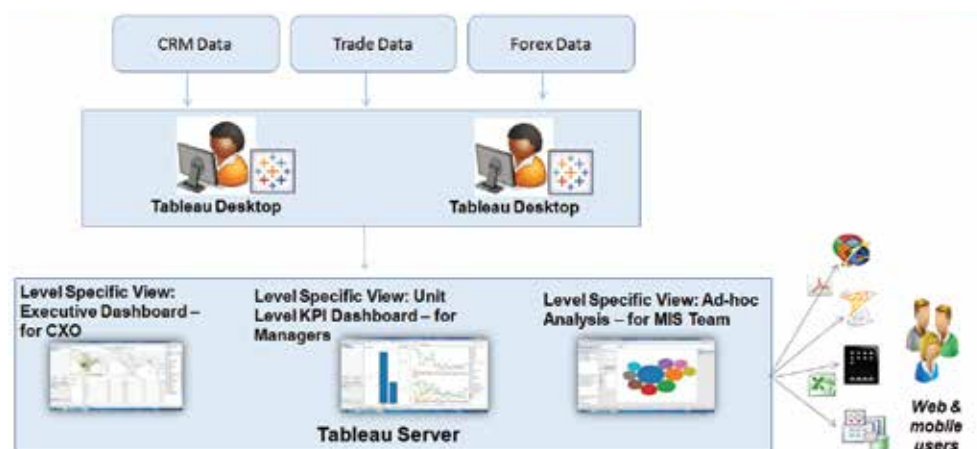
Approach

- Tableau was connected with the existing data bases of the organization
- Unique and relevant visual dashboards & reports were developed for people at different levels across the organization as well as to cater the day-to-day needs of different departments

Benefits

- Time taken to generate analytical reports/MIS reduced to 1-2days with zero loss of data
- Efficient integration of excel and other flat files based data with structured data to create deep & versatile analytical insights
- Easy and optimized data visualization options to slice & dice the reports for more meaningful and comprehensive viewing
- Enhanced security features with role based access
- Maximum level of ease to distribute & share the reports even amongst extended team members
- Dependency on the IT team or external vendors for report generation was minimized
- Easy installation and integration of the solution with the existing system reduced Total Cost of Ownership for the client
- Boosted the identification of cross-selling and up-selling opportunities

Process



Result

Datamatics' solution was highly responsive and generated quick reports on the changing market sentiments, ensuring that the client was always a step ahead from the competitors. Intuitive UI and secured on-the-go features guaranteed timely and accurate decision making without compromising on security.