

How ERI's Technology Supports High-Performing Investment Strategies

Please explain why you/your business was able to reach this award-winning level?

Private wealth managers are navigating a rapidly evolving landscape marked by market volatility, increasing regulatory constraints and mounting pressure on costs and fees. At the same time, client expectations have shifted significantly, with individuals seeking a more holistic, goal-based approach to wealth management, one that integrates their broader life ambitions, long-term financial security and values-driven investing, including ESG considerations. Additionally, the rise of digital engagement and the growing importance of intergenerational wealth transfer are compelling institutions to modernise their offerings and deliver seamless, technology-driven and highly personalised experiences. This is why adopting a modern technology platform that not only streamlines a bank's core operations but also provides advanced portfolio management capabilities has become essential for wealth managers. Recognising this need, we have focused heavily on enhancing our solutions in this area over the past few years and we are now seeing the tangible impact of this investment.

How do you intend to remain on the front foot and continue to set a high standard?

We continuously monitor the evolving needs and challenges of the market, with a strong focus on the growing demand for interoperability and API-driven ecosystems. Wealth managers increasingly require seamless integration with trading platforms, risk engines and third-party providers and we have prioritised these capabilities to enhance operational efficiency and data connectivity.

The demand for AI-driven predictive analytics and machine learning is also accelerating and we are actively investing in these technologies to ensure our solutions meet the evolving expectations of our clients. The OLYMPIC Banking System portfolio management solution enables automated portfolio rebalancing and customised investment strategies, leveraging real-time data aggregation to improve decision-making across multiple asset classes.

Furthermore, stricter financial regulations (e.g., Basel III, MiFID II, SEC rules) require robust reporting, transparency and risk assessment capabilities. ERI has consistently anticipated these regulatory shifts, ensuring our clients remain compliant while effectively managing diverse portfolios.

Finally, the growing demand for ESG (Environmental, Social and Governance) investing calls for advanced data integration and screening tools, which we have embedded into our solutions to help wealth managers align investment strategies with client values and sustainability goals.

In what ways were you able to deal with challenges and problems this time around?

Ensuring a single source of truth has long been a challenge for banks. Our Portfolio Management System is fully integrated with the core banking platform and seamlessly interfaces with satellite solutions, providing end-to-end traceability. By eliminating data replication, it ensures real-time access to accurate information, reducing reconciliation efforts and discrepancies across front, middle and back-office operations.

Another critical challenge is increasing client involvement in investment strategies. High-net-worth and institutional clients now expect seamless digital experiences, real-time portfolio performance tracking and hyper-personalised investment insights. To meet these demands, we have significantly enhanced our capabilities, enabling customised investment proposals and advanced performance analysis.

We have also worked closely with our clients to support their technology transformation journey, recognising that the Portfolio Management System is a cornerstone of this evolution. For example, with one of our clients, we successfully eliminated multiple interfaces to external applications, reducing complexity and creating a more consolidated, reliable IT foundation for the group.



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