

CROSSINVEST SA: TELEKURS iD OFFERS A DECISIVE LEAD IN THE INFORMATION STAKES WHEN PROVIDING INDEPENDENT INVESTMENT ADVICE

Domiciled in Lugano, Crossinvest SA has been offering comprehensive investment advisory services to private clients and entrepreneurial families since 1985. In 2006, Crossinvest SA decided to strengthen its long-standing client relationship with Telekurs Financial by installing Telekurs iD financial displays in addition to Valordata Feed (VDF) in its front and back office. Since April 2006, VDF has been updating the securities database and portfolios of Crossinvest SA on a daily basis, while Telekurs iD has been supplying the company with important background information, news and stock market quotes for its client advisory services and securities administration.

Crossinvest SA, one of the larger independent investment advisory firms in the Ticino financial centre, has been operating successfully for over 20 years. Since its establishment in 1985, Crossinvest SA has provided comprehensive financial consulting services for an international clientele. The high quality of these services has contributed significantly to the excellent reputation of the Ticino-based investment advisor. As a member of the Association of Swiss Asset Managers (ASAM), Crossinvest SA satisfies the same statutory requirements as a Swiss banking institution particularly with regard to the prevention of money laundering and white-collar crime. As a general rule, the main focus of an independent asset manager's activities is not on selling a specific service or specific financial products but on addressing each client's individual requirements.

Extensive securities database is a deciding factor

As well as providing a high-quality offering, Crossinvest SA also demands high standards of quality from its financial data provider. This is confirmed by Pietro Bernardini, Head of IT at Crossinvest SA: "In order to perform daily portfolio valuations and to obtain up-to-date market summaries, we require an extensive data universe that can also be readily used for internal applications." In 2006, Crossinvest SA therefore decided to further strengthen its long-standing client relationship with Telekurs Financial. As well as accessing valuation prices via Valordata Feed (VDF) each day, it decided to install the Telekurs iD financial display system in its front and back office. One factor was of decisive importance in this context, as Pietro Bernardini explains: "Our decision was based in particular on Telekurs Financial's very extensive securities database." It offers Crossinvest SA the full range of real-time stock market quotes, news, corporate actions and other securities information that now serves as the basis for qualitative client advice.

Enhancing usability through professional support

A number of employees at Crossinvest SA have been making daily use of Telekurs iD as a source of information and as a basis for their work since April 2006. According to Pietro Bernardini, the team soon got used to the new display system and is benefiting from the extensive new range of data it offers. The employees use Telekurs iD for various front- and back-office tasks. For example, it is an important tool when advising clients and also provides daily market summaries. In addition, it is useful for specific back-office tasks such as the entry of new stocks or securities searches. The professional support provided by the Lugano branch of Telekurs is undoubtedly one of the factors that enabled Crossinvest SA employees who were still using a rival Swiss solution in 2005 to adapt rapidly to the new display system.



Renato Bianchetti, Head of Telekurs Lugano, stated: “Since Telekurs **iD** was replacing another product, I configured special user screens in the new display system for each user. This made it much easier for the employees of Crossinvest SA to rapidly and efficiently get to grips with the new display solution.” Does Telekurs **iD** offer Crossinvest SA other benefits?

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- Telekurs **iD** financial data provide the employees of Crossinvest SA with important background information for the provision of investment advice. Thanks to the intelligent linking of all financial data, it is only necessary to click once on a quote and the extensive context menu then refers users to additional information such as company and data analyses, corporate actions and news, as well as helpful functions like the DDE link that enables data to be exported to Excel.
- Legal compliance is currently also a key aspect of the requirements governing the quality of financial data such as when implementing the European MiFID directive. MiFID reference data supplied by Telekurs Financial help banks and financial services companies to fulfil the new regulations relating to areas such as securities trading and securities settlement. “It is very important to always have access to the latest regulatory key data especially to ensure that securities are entered correctly. Telekurs Financial makes an important contribution towards this”, confirms Pietro Bernardini.
- Finally, the use of Telekurs **iD** in combination with the processing product Valordata Feed (VDF) creates benefits for Crossinvest SA in terms of data coherence, as the asset manager can draw on a single, reliable source of data for functions ranging from portfolio management and the entry of new securities to the provision of client advice.

The strengths of Telekurs **iD**

- The various navigation options (right mouse button, drag & drop) allow the individual, intuitive use of the modern financial information display system.
- Telekurs **iD** helps users to research new investment opportunities efficiently with its various search options (quick search, extended search or shortcuts).
- Intelligent linking of financial data: relevant news, corporate actions and historical or current Time & Sales data can be accessed rapidly and directly from a quote.
- The support services offered by Telekurs **iD** include regular training updates and a 24-hour help desk for user enquiries relating to technical issues or data content.

Approximately four months after installation, Crossinvest SA’s verdict on the use of Telekurs **iD** is very positive. Thanks to a combination of real-time quotes, news and detailed information in the specially created user screens, the partners and employees of Crossinvest SA can rapidly find out what is happening in the global markets at all times. In addition, the special features (limits, data export, analyses, etc.) of Telekurs **iD** mean that the asset manager can always respond quickly to short-term changes in the markets and demonstrate new investment opportunities to clients.

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