

GENERALI (SWITZERLAND) HOLDING: TELEKURS iD PROVES ITS WORTH AS A SOURCE OF INFORMATION FOR THE FINANCIAL EXPERTS OF A SUCCESSFUL INSURANCE GROUP

Telekurs iD has been in use at different companies of GENERALI (Switzerland) Holding since summer 2005. With its modular design and the wide range of global financial information, Telekurs iD can meet the information requirements of the various business areas. Of crucial importance to fund and asset management are the real-time quotes, charts and news that Telekurs iD provides, whereas reference data counts the most when capturing and updating securities in the SAP database. Telekurs iD now also supplies the insurance group with all the additional data it needs to classify securities in compliance with the EU directive on the taxation of savings income.

All the activities of the GENERALI group in Switzerland are conducted under the umbrella of GENERALI (Switzerland) Holding. While its two “Non-Life” and “Life” divisions cover the entire insurance portfolio for both private and corporate customers, Fortuna Investment AG and Fortuna Investment AG Vaduz specialize in the management of Fortuna investment funds in Switzerland and Liechtenstein respectively. GENERALI Investment Consulting AG, meanwhile, manages the group’s capital assets in the three most important investment categories of property, mortgages and securities. Fortuna Investment AG and GENERALI Investment Consulting AG have been using Telekurs iD as a financial information display system since summer 2005.

The goal: a global display solution for the most diverse information needs

As a global financial information display system, Telekurs iD should provide a perfect, flexible solution for various business areas such as fund and asset management and for the daily capture of securities data in an SAP database. Telekurs iD is modular in design and has specially configured packages that vary in terms of data scope and features so as to cover a wide range of requirements. The GENERALI group Switzerland has opted for the comprehensive Advisory Package, with a supplementary package to provide it with all the additional data it needs to classify securities in compliance with the EU directive on the taxation of savings income. So how is Telekurs iD performing in the day-to-day operations of various areas? This is what we asked four financial professionals at the GENERALI group Switzerland.

Suitable screens for market updates and securities records

Ralph Schmid is head of Third-party Funds at GENERALI Insurance. Thanks to Telekurs iD, he has been able to customize his own screen so that all the real-time data of relevance to his work is visible at a glance. He says: “I need the comprehensive financial data provided by Telekurs iD to manage the funds’ reference data. Thanks to Telekurs iD, I also receive my own personal market update.”

Brigitte Frey is responsible for the daily capture of securities data in an SAP database at GENERALI Investment Consulting AG and now uses Telekurs iD for this purpose. “Every time I receive an order to open a new instrument,” she says, “Telekurs iD gives me the information I need.”

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And how does Telekurs **iD** perform in asset management? This is what head of Capital Investments Dr. Karl Schönenberger has to say: “In my daily business, what I rely on most are the real-time quotes and news provided by Telekurs **iD**.” And IT expert Raymond Crausaz of GENERALI Insurance has discovered yet another advantage of the financial information display system: “Telekurs **iD** is a good way of double-checking valuation prices,” he says. “Although our end-of-day prices are received automatically via the relevant Telekurs platform, with Telekurs **iD**, I can check certain data in real time as well.”

One of the main advantages of Telekurs **iD**, in other words, is the fact that it can be used in a number of different areas. And its other advantages?

Thanks to the various navigation tools provided by Telekurs **iD** (drag & drop and a context menu accessed by clicking the right mouse button), the financial experts at the GENERALI group Switzerland have direct access to the information they need. Furthermore, the specific screens needed in each area can largely be customized to meet individual requirements. As Ralph Schmid says, “Once I became familiar with Telekurs **iD**, I realized that its logical presentation was greatly helping me to create my own market overview. Telekurs **iD** has turned out to be a very user-friendly display system for my needs.”

The strengths of Telekurs **iD**

- Telekurs **iD** covers the various information requirements of various business areas of GENERALI (Switzerland) Holding. Telekurs **iD** has proven its worth as a financial information display system for fund and asset management, for the capture of reference data for securities and for monitoring end-of-day prices.
- Access to the whole of Telekurs Financial’s securities database: basic data, real-time quotes, corporate actions and news. The additional data required for the EU taxation of savings income constitute clear added value in the correct classification of the relevant securities data.
- The logical design of Telekurs **iD** enables the financial professionals at the GENERALI group Switzerland to set up screens tailored to their individual needs.
- Intelligent linking of financial data: starting from a quote, you can access the relevant news, corporate actions or charts directly. A clear advantage for asset management!

After around nine months of working with Telekurs **iD**, the representatives of the GENERALI group Switzerland are very pleased with its performance. And the partnership between Telekurs Financial and this successful insurance group works so well that, should the group have any new requirements, there will be a wide range of suitable financial information products for it to choose from.

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