



Best Order Management System – SS&C Eze

Product: Eze OMS



Frank Maltais
SS&C Eze



“We were looking for a system that could tailor its services to CSOP’s needs. We were impressed by the level of investment in the system’s capabilities. SS&C Eze Investment Suite’s configurable rebalancing and benchmark features streamline our portfolio management and trading workflows. This technology investment will help us grow our business and provide global investors [with] better exposure to China’s indexes.”

Yuhang Zhuang, head of operations at CSOP (China’s first offshore asset manager and a leading ETF provider in APAC)



“It’s a tremendous honor to be named best OMS for the second year in a row at the WaterTechnology Asia Awards. Obviously, over the past year the pandemic created a lot of unique challenges that we’ve all had to navigate. Amidst this uncertainty, we continued welcoming new clients onto our platforms, investing in our products, and enhancing our services. And none of this would have been possible without our incredible SS&C Eze teams, who have an unparalleled dedication and passion for delivering modern investment management solutions and exceptional expertise to our 220+ APAC clients.”

Frank Maltais, Regional Director, APAC, SS&C Eze

WHY THEY WON

SS&C Eze wins this category due to the enhancements it made to the OMS over the past year. It continues to focus on providing multi-asset tools allowing portfolio managers to manage their books more effectively. It has also focused on streamlining and scaling workflows, allowing users to generate trades across a portfolio for a single investment six times faster than before.

WHAT’S NEW

- SS&C invests heavily into the R&D of its products annually and made a lot of changes to its Eze OMS over the past 12 months, with a major focus on streamlining functions for portfolio managers.
- Over the last year, SS&C Eze focused on a number of key enhancement areas including enhanced integrations, system scalability, expanded multi-asset class workflows, and additional reporting options.
- The company launched major improvements to its multi-asset class capabilities, enhancing its fixed-income analytics with the addition of more fixed-income risk metric columns that allow users to assess risk from one screen.
- Portfolio managers can take advantage of enhanced look-through capabilities and split composite securities into constituents when modelling their portfolios.
- Eze OMS also continued to provide the front-office the multi-asset class tools they need with a new Repo trade ticket and Deal Manager giving clients control over the entire repo trade lifecycle.

WHAT’S TO COME

- SS&C Eze has always highlighted the benefits of its open architecture and is looking to extend that further, focusing on interoperability and enhancing the platform architecture to give clients more options to access and leverage their investment data.
- A new mobile app powered by Eze Eclipse was launched last year. Trade execution functionality has recently been added to this and SS&C Eze will be working to expand the Mobile app’s support to Eze OMS and its other solutions. Input from clients and UX testing is driving the design of the app and initial feedback has been positive.
- The company will continue to enhance and expand its multi-asset class capabilities to ensure clients have the tools they need to onboard new asset classes and implement those strategies.