

SOLUTIONS FOR GROWTH: SCALABLE CUSTOMIZATION



The same, but different. Investors' interest in customized investments that meet their values and tax preferences, creating operational demands and stressing investment managers' resources and technology. Through novel account structures, investor-preference overlays to portfolio models, and efficient order generation, blocking, and communication to the street, Archer helps investment managers maintain the integrity of their investment process while meeting investor customization needs at scale.

THE CHALLENGE

A \$20+ billion advisor-focused independent asset manager was looking to streamline its workflow, particularly the process of realigning investors' multi-strategy accounts. The firm's high-touch process required seven to ten days of tedious effort from the operations team, during which time the portfolio managers' model changes could not be implemented.

THE SOLUTION

Archer partnered with the manager to coordinate the staging and execution of the trades needed to deploy the multi-strategy realignments. Through increased coordination, quality control, and technology-assisted automations, the joint team improved efficiency and decreased risk and costs.

The new process enabled the team to generate more than one million trades across thousands of custom strategy and marketed multi sleeve accounts in one hour by deploying custom strategy weights across the population of accounts. Within two business days, all strategies were aligned to their assigned allocations and all sleeves were realigned to their respective underlying portfolio models.

Archer's partnership and application of the customized solution reduced the rebalancing time and freed the investment management team to shift their focus from operations to generating investment results. This streamlined process provided assurance that the team can continue to deliver a positive investor experience that will scale as they grow.