

CASE STUDY: SCALABILITY INITIATIVE

› In 2016, BISAM launched a new scalability initiative in partnership with current B-One users to ensure that as our customers' processes evolve and their businesses grow, they can confidently rely on B-One to scale with them. Because of the work with our customers, we now have a proven process in place to ensure that with each new release of B-One, including our most recent 3.12 release, we have a path that continues to progress and ensures our customers can successfully scale and continue to do so over time.

The following case studies outline how BISAM's B-One development team partnered with two particular customers to help them to adapt B-One to their evolving operations and processes with successful upgrades to B-One 3.12 – resulting in vastly improved operations, processing and response times.

AT-A-GLANCE

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Outline

We follow how BISAM's B-One development team partnered with two particular customers to help them achieve vastly improved operations, processing and response times.

SCALABILITY SUCCESS STORY #1

Challenge: This asset manager was experiencing the growing pains of steadily increasing volumes (3x increase in daily volume since becoming a BISAM customer in 2013), driven by organic growth from new mandates and acquisitions; and internal demands from the business in the form of new classifications, benchmarks, currencies and custom dates.

Specifically, they were under internal business pressure to deliver on a 7:00 a.m. SLA; and they had grown from 2000 attribution calculations when they started with B-One three years earlier to 16,000 calculations. Needless to say, they had concerns about current and future scalability across their performance operations.

Solution: And so, the customer set up a lab, hired a technician to run independent stress tests and invited the BISAM B-One team to be part of the lab and partner with them to address the specific performance issues they were experiencing and to make recommendations on both software and hardware. This approach worked very well, as it was a true partnership. The

joint team ultimately brought in better hardware and migrated them from version 3.8, in which the initial "lab" tests were run, to version 3.12. The coupling of the new hardware and the 3.12 upgrade resulted in vast improvements.

Results:

- 5-20% improvement in their overall processes
- Nightly processes reduced by 50% - from six to eight hours to two to three hours
- Can now recompute elementary results and launch equity attribution on multiple bases at once

“We now get sub-second responses resulting in greater efficiencies in our day to day activities.”

SCALABILITY SUCCESS STORY #2

Challenge: This large institutional investment manager and top 100 mutual fund company uses B-One as a critical component in their architecture, leveraging the BISAM WebService API layer, which integrates with a proprietary performance application. The proprietary system paired with the B-One API provides their analysts with ad-hoc access to results for daily validation and responding to external requests.

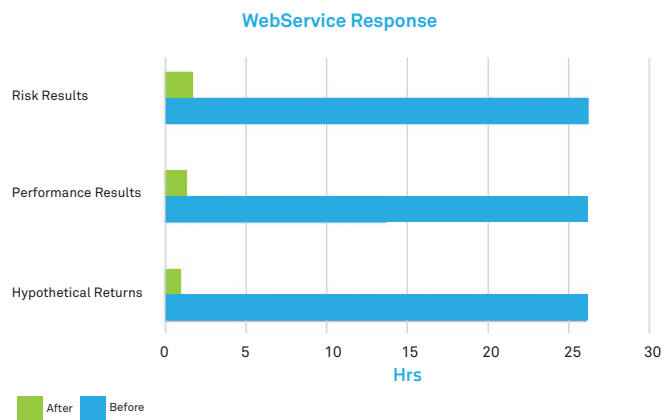
Prior to their 3.12 upgrade, the customer was running into latency issues with the WebServices, which was creating a slowdown in their processing times and threatening their SLA to other subsidiaries with their firm. Eager to stabilize quickly, the customer's technical team worked closely with the B-One team to identify the root cause of the latency and work quickly to address the issue.

Solution: The B-One team partnered up with the customer to identify the APIs that were slowing down their operations, and to discover if an upgrade to B-One version 3.12 would improve the situation. The B-One and customer teams started with a test environment, re-coded the APIs and found that the 3.12 upgrade fixed the latency situation and enabled the API call to go to any available B-One node without being held to a particular

server and login. They were also able to take better advantage of B-One for restatement processing, quick results and on the fly calculations.

Results:

- 90 – 98% reduction in processing time, with major improvements in the ad-hoc API
- Improved overall restatement processing by 20-25%
- Optimized B-One for rebalancing, scalability and failover



About BISAM

BISAM is the leading provider of sophisticated digital solutions for performance, attribution, market risk, portfolio construction, GIPS composites management and reporting. Many of the world's largest asset managers use BISAM's best-in-class portfolio analytics platforms to evaluate and enhance their investment strategies and better service their clients, while maintaining high levels of security, transparency, process control and operational scale.

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