



Oxon Consulting

PAS PLATFORM BUILDING

WHITE PAPER



WE CAN HELP YOU TO BUILD A ROBUST PLATFORM FOR PERFORMANCE AND PORTFOLIO ANALYTICS REPORTING

PAS PLATFORM BUILDING



Many asset management firms keep experiencing errors and delays on client reporting and factsheet production, even after spending millions on system implementation and analyst hire. And the situation gets worse as they expand business with the launch of more new funds. Oxon understands what it is, why it happens and how to resolve it. We can help you to build a robust platform for performance and portfolio analytics reporting.

OXON CONSULTING



WHY CHOOSE OXON?

1. Oxon is a professional provider of portfolio analytics to the investment community. Our founder is an Oxford's Postgraduate and a CFA Charterholder with over 21+ years of analytical experience gaining from global asset management firms including HSBC, JF, Allianz, ING and Manulife.
2. We have comprehensive experience in designing and building robust platform for asset management firms to meet their portfolio analytics reporting needs.
3. Oxon offers a number of pragmatic reporting tools that allow automatic generation of essential portfolio analytics and performance reports (add sample reports). These tools are web-based for convenient access, low cost for boutique firms and scalable for giant firms with a large number of funds.



WHY CHOOSE OXON?

4. Our intelligent database and cloud-based reporting technologies have made performance reporting so easy and complete. You can just focus on expanding your investment business.
5. Our process is scalable to support reporting needs for a few thousand funds and no hardware installation is ever required.
6. To facilitate evaluation of your reporting platform, we have developed a Platform Evaluation Tool (PET) to review the sophistication level of your firm and where you stand by industry standard.



ARE YOU FLUCTUATED WITH PORTFOLIO ANALYTICS REPORTING ISSUES?

PAS PLATFORM BUILDING



Are you fluctuated with portfolio analytics reporting issues? KEEP CALM AND CONSULT OXON. Our performance consultant, database manager and software engineer will work together to meet your needs. In addition, Oxon also offers consulting services, helping financial institutions:

- to accomplish successful claim of Independent GIPS Verification and
- conduct rigorous due diligence for Investment Manager Selection

OXON CONSULTING



Oxon Consulting

About Oxon Consulting

Oxon is a professional provider of industry solutions to financial institutions and asset management firms. We offer consulting services for the building of portfolio analytics reporting platform to asset management firms and pension plan sponsors. We also offer a number of pragmatic tools for performance and portfolio analytics reporting. Our unique ability to create quality, customized products – along with our unrivaled capacity to provide GIPS verification and investment manager selection services – makes us an indispensable partner to the investment community. Oxon has the right combination of technology and services to meet your needs.



+852 9055 1550 www.oxonconsulting.com ernestleung@oxonconsulting.com