

# Brokerage and AM Solution for Halyk Financial

**Client:** Halyk Financial

**Objectives:**

- Decipher and understand client workflow across dozens of non-integrated legacy systems and dozens of regional and local execution platforms and data vendors
- Automate full client workflow from onboarding to trading on various global markets and platforms
- Need to deploy system (onboarding, OMS, reports, etc. on multiple channels (mobile, online, etc.)
- Support for various business processes for the same task (processes depend on platform)
- Complex and developed workflow for broker-client interactions
- Extensive fees and commissions particular to different client types and markets

**Why NCW was a good fit:**

- Transparent workflow management in NCW allowed us to quickly model Halyk's existing workflow and automate it with almost full nocode maintenance
- Narrow API's allow for deployment of new applications, data, and processes across multiple platforms
- Business processes are tailored to the platform and data channel with support for different processes under different circumstances (in-person differs from mobile onboarding in validations, agreements, etc.)
- System simplifies management of complex document workflows with various reports and agreements processing alongside client interactions such as approvals, signatures, etc.
- DB management GUI's enable flexible construction of fees/commissions tables and instruments directories

