Robo-advising for GazpromBank

Client: GazpromBank

Objectives:

- Ongoing configuration of rules for risk profiling
- Need to support multiple custom allocation models simultaneously
- Need to be able to add proprietary models and for them to be portable
- Ability to add new portfolio types with independent sets of rules and models
- Need to be service based to integrate easily into and with existing applications and client channels

Why NCW was a good fit:

- DNM rule engine enabled multiple steps, sorted into branches, for questionnaires with GUI for making changes and automated data modeling for bypassing IT support with new data types
- Service based architecture allowed for rapid and seamless integration with multiple channels (mobile, online portal, banking client, etc.) and systems (onboarding, CRM, OMS, reports)
- Allows for many custom macros and models for portfolio specific calculations