

The Data Foundation for Growth

Market and Asset Class Scalability:

How FINBOURNE Helped a Leading
Pension Fund Fulfil Their Global Ambitions

“ Our purpose is to pay the pensions of our current and future policyholders, and a robust data strategy is critical to achieving this. ”

Head of Investment Operations

Background

With a mission to deliver financial security and growth, a large pension fund, with millions of members and hundreds of billions in AUM, had its sights set on global expansion.

The pension fund aimed to increase its presence in key international markets, as well as expand into alternative asset classes, to enhance returns for its members. Achieving this required a robust, future-proof operational framework capable of scaling with its ambitions.

The Challenge

The pension fund's rapid growth exposed inefficiencies in its operational processes, as well as gaps in its capabilities, which had the potential to undermine its global ambitions.



No near real-time capabilities

The existing IBOR relied on batch processes, preventing teams in international offices from accessing accurate start-of-day positions in their respective time zones.



Complex data operations

With little automation, the fund found itself relying on large teams of data analysts and time-consuming, error-prone processes.



Manual reporting processes

Creating client-facing reports was extremely time-consuming, requiring extensive manual work, reducing efficiency and increasing the risk of errors.



No private market asset integration

The legacy system could not consolidate data on the fund's private and public market holdings in a single system, impacting its ability to ensure sufficient cash was available for members at any given time.

The Solution

To address these challenges, the pension fund partnered with FINBOURNE to implement a scalable, modern platform capable of supporting its global growth.



LUSID EDM+

A cloud-native investment data platform that eliminated manual intervention in the fund's data operations team.

LUSID integrated with the fund's existing Portfolio Management System, providing it with the latest market and position data.



Luminesce

A data virtualisation platform enabling near real-time access to critical investment data, replacing manual reporting with automated workflows that drastically reduced reporting time.

Why They Chose FINBOURNE

- **Easy to deploy**

Seamless integration with existing systems, reducing the cost and complexity of implementation.

- **Secure by design**

Advanced data security and governance features, ensuring compliance with regulatory requirements.

- **Future-facing**

An innovative, future-proof technology stack capable of supporting the fund's long-term growth.

The Outcome



Better decisions

Operational teams now access near real-time data, enabling faster, more accurate decision-making across global offices.



Greater efficiency

Automated workflows replaced time-intensive manual reporting, freeing up resources to focus on strategic initiatives.



Unlimited scalability

The fund gained the flexibility and transparency needed to deliver improved member outcomes and scale effectively in a competitive global market.



About

FINBOURNE's solutions deliver an interconnected network of functionality and data that enables the investment community to better serve clients in a constantly evolving market.

Its investment management solutions and cloud-native data management platform ensure that investment and operations teams can increase revenue, reduce costs, and better manage risk across the investment life cycle.

Get in touch

To discover more about FINBOURNE and learn how our solutions can drive growth, increase control and improve data access, contact us below

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