

## Tricio investment support module

### Investment product and solutions development



#### Our support includes:

- Advice on how to create in-house products for your clients
- Help to find and coordinate with third party suppliers
- Support in dealing with any regulatory and legal documentation
- Support for your colleagues in managing the project, both for product launch and post-launch management

#### Example from past experience

In the past, an international security house partnered with one of our specialists to create a new index for the Chinese stock market. The firm's analyst had a very good track record in picking the right sectors, and the firm wanted to turn that into an index that would be investible.

The index would be used both for high net worth clients and for investment funds.

#### ***An actionable solution***

As a quantitative expert, the specialist worked with the firm on possible ways to construct the index. The challenge was that the index invested in a stock market that was less advanced than major developed stock markets. This added to the constraints in developing the index rules.

The specialist balanced these constraints and created a new index that leveraged the skills of the analyst, which can be implemented in different portfolios despite the practical limitations of the market.