

Etops empowers digitalization processes for the financial industry

Founded in 2010, Etops offers a broad range of solutions and services for the financial industry from data collection, refinement and aggregation to high-end operations and consulting, from complex integration projects to state-of-the-art reporting, from data analytics and warehouses to mobile apps and dashboards to fully-fledged portfolio management and compliance solutions.

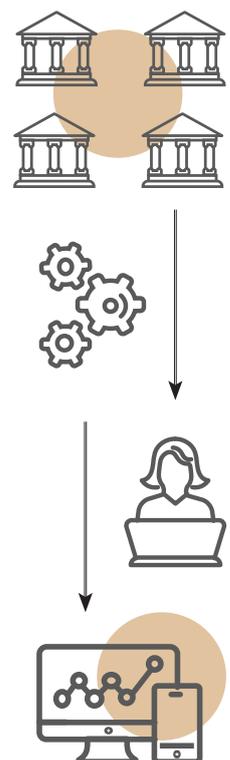
Technology, consulting & services

Based on a mix of technology and service, strengthened by competent consulting, Etops delivers both tailor-made solutions and standardized platform-oriented products.

The solutions cover the entire value chain of private banks, asset and wealth managers, family offices and pension funds: from lead generation, CRM and on-boarding to portfolio management, compliance, and reporting.

Mid- & back office services

The comprehensive mid- and back-office services form the foundation of the Etops' offering. The focus is on leading-edge machine-learning technology that reads and processes all bank documents efficiently and precisely. Data from all custodian banks can be handled, enriched and refined according to client needs. Supplementary services such as reconciliation, manual bookings, compliance and risk management complete the offering.





Multi-bank integration and back & mid office services

The well-established back and mid-office solutions have been available since 2010 and are used by numerous asset managers, fund managers, family offices and hedge funds.

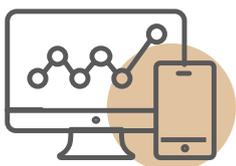
Data analytics & science

Based on the back and mid office services, data management became a central element of the Etops business model, culminating in data-driven solutions created by data sci-

Etops supports all companies within the financial industry in achieving their digitalization goals.

entists that, supported by artificial intelligence, unlock compelling new opportunities for the financial industry in areas such as client acquisition, background checks, compliance and decision making.

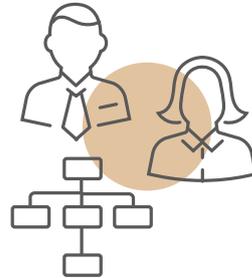
Etops strongly believes in modern data technology and together with strategic partner companies develops trend setting solutions which will mark the beginning of a new era in private banking and wealth management.



Excellence in data visualization: reports, factsheets, dashboards, mobile apps

Reports & factsheets

An essential area of Etops deals with the presentation of information in various forms, production of reports and fact sheets, development of mobile apps and specialized interactive dashboards.



Lead generation, CRM, profiling & on-boarding process

The dashboards are based on standardized data models which guarantee a fast but still flexible integration with existing data sources. The focus on financial topics and the long-term experience of the Etops team ensure short project times and high quality results.



Compliance: strategies, peer groups, thresholds, FIDLEG, MiFID, UCITS ...

Portfolio management

The portfolio management solution combines a comprehensive client management with sophisticated portfolio and asset analytics, fee calculations and reporting capabilities. Regulatory topics like MiFID II, FIDLEG, AML and KYC are fully covered.

Tailor-made solutions

In addition to standardized solutions and services, Etops also offers individual solutions for various topics around the financial reporting and data visualization.



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