

September 30th 2021, Paris

We are pleased to announce that Bank Syz has chosen ALTO* Investment and has been using Amundi Technology solutions and services since February 2021. Through this agreement, Bank Syz teams, portfolio managers, compliance, risk and middle office have access to ALTO* Investment, the front to middle-office Portfolio Management System available in cloud mode, and delegate to Amundi the execution of their orders as well as Middle Office operations, for the management of their Mutual Funds. The Syz Group is a family owned and managed Swiss financial group focused on strong long-term investment performance, robust risk management, and personalized service for clients.

“Here at Syz we’ve always believed that to offer best-in-class investment solutions we need to be prepared to adapt and evolve. Faced with the paradox of needing a Fund Management platform that could both reduce complexity and costs while giving us the flexibility to seize entrepreneurial opportunities and grow, we looked hard for the right solution. With their all-inclusive front-to-back service covering systems, dealing and middle-office for our Mutual Funds, Amundi Technology stood out as the right partner. Successfully migrating to ALTO in record time, we’re now free to focus on delivering the service and performance our clients expect, safe in the knowledge that we have a world-class partner supporting our growth ambitions for the future.”*

Sébastien Bouchet, COO of Bank Syz

“The Amundi Technology team is delighted to welcome Bank Syz to the ALTO Investment client community. This successful ALTO* Investment deployment in Switzerland is key for us and reinforces the Amundi Technology international ambition to offer technology and services to the savings and asset management industry all over the world.”*

Pierre Laborie, Head of sales, Amundi Technology

The ALTO* Investment management tool enables Bank Syz to analyze portfolios, benefit from a real-time IBOR¹ position keeping, simulate and place orders with pre- and post-trade compliance checks, measure performance and control risks. The solution also covers the execution of the entire order flow generated by Syz portfolio managers. This Dealing service covers the principles of “Best Selection” with rigorous annual broker selection committees and “Best Execution” for all asset classes: equities, bonds, money market instruments, forex, listed derivatives and OTC. The Middle Office service completes the range of services offered with the matching broker, settlement and delivery instructions, reconciliation with custodians and valuers. In addition, the solution also includes the provision of a reference data management service, centralized and managed by Amundi’s teams.

