

# PRESIDIO AND INVESTMENT FIRM: LEVERING AI FOR SMARTER, FASTER TRADING

## THE CHALLENGE

The investment firm saw the potential in machine learning and artificial intelligence (AI), with an immediate goal of leveraging its data to shorten response time amid bond market changes. The firm also aimed to execute municipal bond trades faster and with greater insight. To take the next step, the client reached out to its longtime technology partner Presidio.

## THE APPROACH

Presidio conducted a thorough evaluation of the investment firm's infrastructure and business goals and presented a solution: a mix of AWS-native tools delivered on a Delta Bravo platform.

To bring this solution to life, the team developed a roadmap and vision for the environment, including scale and ongoing cost. Presidio's data center and data analytics specialists established policies and processes for data management and governance: how raw data from multiple sources would be ingested, cleansed, refined, and curated for advanced analytics and AI consumption. Cybersecurity experts integrated security and access architecture built to the client's requirements.

Presidio designed the solution in two weeks and delivered it in less than 60 days without disrupting the firm's ongoing operations. The solution integrated with existing business processes, further minimizing the learning curve by delivering tools and software the banking team already knew. Meanwhile, Delta Bravo provided the expertise to build and support an enterprise data lake and a machine learning/AI environment.

## THE RESULTS

This investment firm is now able to store, cleanse, and analyze large amounts of data quickly and cost-effectively. Automation shortens analyst response time, and—by removing the possibility of human errors in data cleansing—improves the quality of data analysis. AWS QuickSight gives the staff the ability to build custom dashboards, and get the insights they need into the bond market. Presidio and Delta Bravo monitor and support security and reliability, freeing up the client's IT staff for other initiatives.

Looking ahead, the solution establishes a strong foundation for this investment firm's future in AI: Ingesting data from the range of sources (e.g., market data, historic transactions, indicators) and cleaning it in real time, so analysts and traders can visualize and model it.

## THE CUSTOMER

The client was a leading boutique investment firm with over \$10 billion of assets under management, serving high-net worth individuals and families, institutional investors, endowment, foundations, and more throughout the United States. To remain competitive, the company required state-of-the-art tools used by large trading firms while offering the customization and personalized service that differentiated it in the marketplace.

## PARTNERS



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