

Riverbed for Investment Services

A simple, smart, and open suite that optimizes the digital experience of investment services employees and customers.

The fast-paced world of investment services faces many challenges, from providing Investment Advisors and Wealth Managers with swift and dependable portfolio management and market research tools to the increasing adoption of fintech innovations and robo-advisors reshaping client interactions.

Moreover, the industry's commitment to regulatory compliance, including stringent measures like anti-money laundering means navigating these challenges requires not only staying ahead of technological advancements but also ensuring seamless adherence to regulatory frameworks.

Solving Key Challenges for Investment Services

Addressing these challenges calls for the implementation of advanced IT systems to empower and retain Wealth Managers in their roles. This entails optimizing portfolio management and market research systems, incorporating artificial intelligence and automation, and ensuring robust governance and control—all while optimizing resource utilization, both economically and environmentally.

“Challenges abound in the investment services sector, from regulatory compliance to technological disruptions. Success hinges on our ability to adapt, innovate, and maintain unwavering integrity in an ever-evolving landscape.”

Abigail Johnson, CEO of Fidelity Investments

Supporting Investment Advisors and Wealth Managers

Wealth managers are the VIPs of the investment services industry, entrusted with the stewardship of their clients' financial futures. To effectively serve their clientele and remain competitive, wealth managers require fast and reliable portfolio management and market research systems, as these tools are the lifeblood of their profession.

In this high-stakes environment, downtime is not an option. When issues do arise, Riverbed provides fast resolution to maintain seamless operations and client satisfaction.

Supporting Wealth Managers isn't just a matter of convenience—it's essential for retaining top talent and preserving trust in an industry built on precision and reliability.

“Failing to meet the digital experience demands of younger generations can be disruptive (63%), including potentially reputation destroying, and over 68% believe employees would consider leaving the company.”

Riverbed DEX Survey 2023

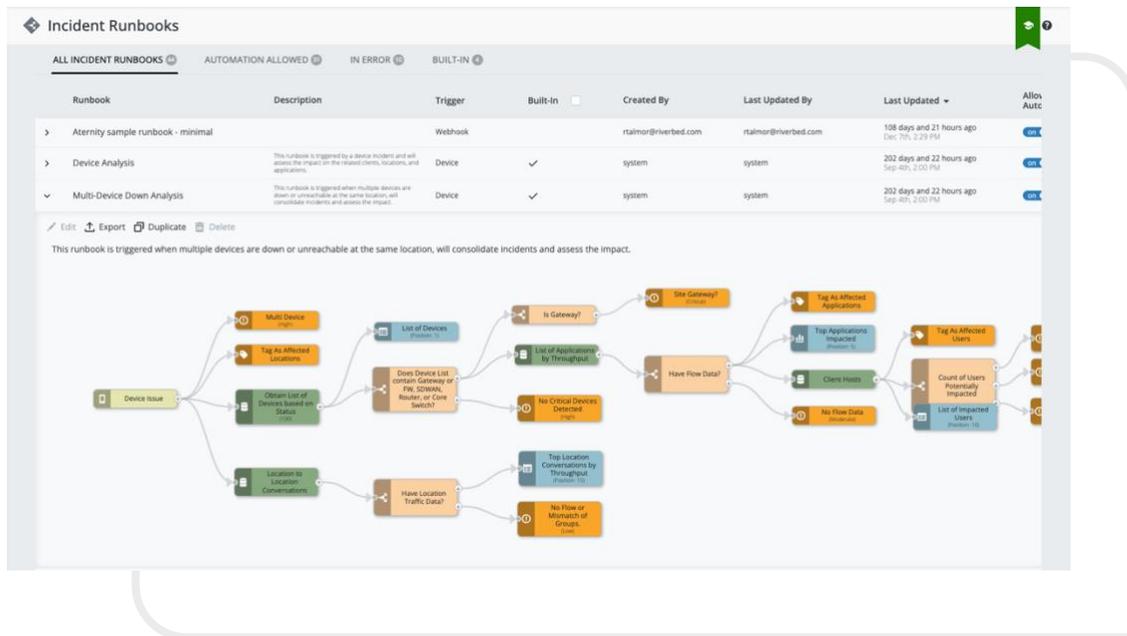


Figure 1: Riverbed provides automation of incident runbooks to ensure that core investment services and networks are working.

Optimizing Portfolio Management and Market Research

In the dynamic world of wealth management, the optimization of speed and reliability of applications is paramount to success. Portfolio management software, market research and analysis tools, and emerging innovations like robo-advisor technology serve as the backbone of wealth managers' operations, providing market trends, execution of trades, and timely advice to their clients. For instance, industry-leading platforms such as Bloomberg offer comprehensive market data and analytics, empowering wealth managers to make informed decisions in real-time. In an environment where every second counts, any latency or downtime in these applications can have significant repercussions, potentially resulting in missed opportunities or compromised client trust.

Riverbed monitors the performance of these applications, as well as the network and infrastructure they run on, to proactively identify bottlenecks and opportunities for improvement.

Optimizing these critical tools isn't merely a matter of convenience – it's a strategic imperative for investment services firms seeking to stay ahead of the curve and deliver exceptional service to their clientele.

“The unified observability solution from Riverbed has given us the ability to provide a stable, high performing environment for our users, which translates to high quality experiences for hundreds of thousands of members.”
Senior Vice President of IM Operations

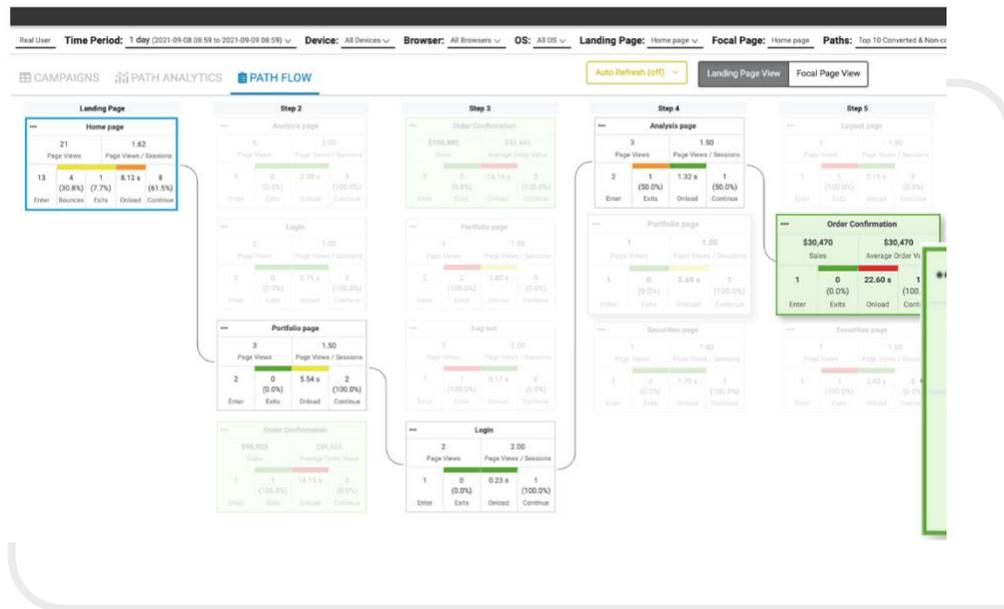


Figure 2: Manage and optimize every step taken by Wealth Managers

Assure Security, Regulatory Compliance and Sustainability

Investment services companies, facing various regulations and compliance demands depending on their locations, find valuable support in Riverbed solutions. These solutions simplify compliance and audit processes, ensuring that everything stays on track. With user-friendly historical reporting and reliable long-term audit trails, Riverbed helps keep disruptions to a minimum during internal and external compliance checks.

With a growing emphasis on environmental responsibility, many investment services companies are actively working to reduce their ecological impact. Riverbed's unique ability to gather information across networks, infrastructure, applications, devices, and users proves instrumental in driving eco-friendly initiatives based on informed data decisions.

Riverbed offers ready-made dashboards that provide insightful views into energy consumption and carbon emissions at the individual, organization, and company levels. By implementing changes such as adjusting

power plans and guiding users on efficient energy use, Riverbed actively contributes to cost savings and a positive reduction in the carbon footprint.

Riverbed can also help reduce the waste and costs related to employee device refresh programs by correlating user experience to device health and performance. This can prolong the life of employee devices by replacing only those devices that aren't performing well.

“Integrating sustainability into investment strategies isn't just about 'doing good'; it's about future-proofing portfolios and maximizing long-term returns. Companies that fail to consider sustainability factors are ignoring risks that could profoundly impact their bottom line.”

Fiona Reynolds, CEO of Principles for Responsible Investment

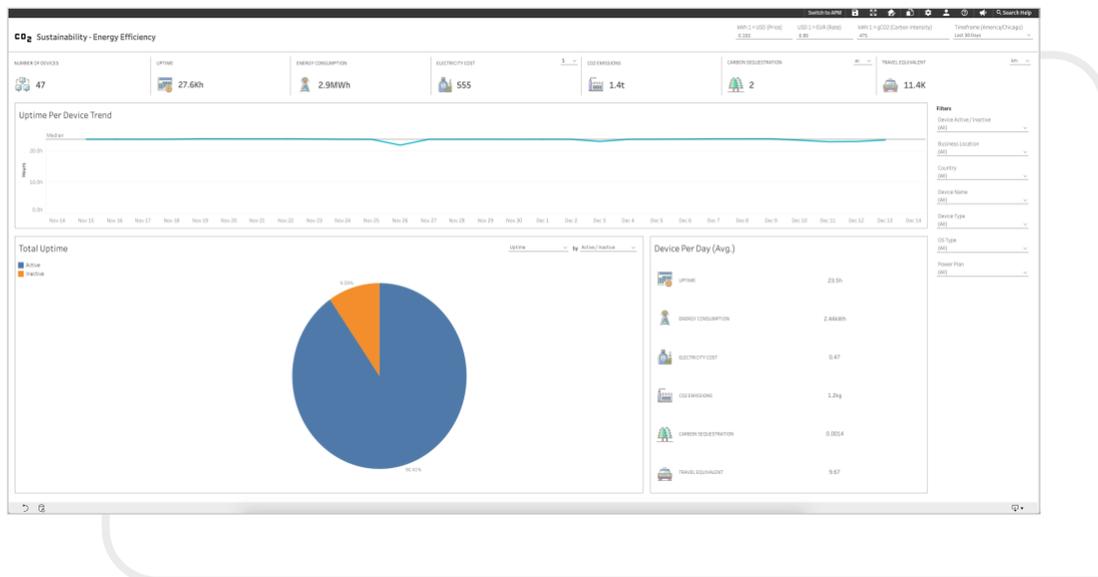


Figure 3: Out-of-the-box dashboards provide actionable insights into energy consumption and carbon emissions at both the individual and company level

Learn more

Riverbed provides a simple, smart, and open platform architecture. The Riverbed Platform combines modules for digital experience, infrastructure, network, cloud, and application observability and application acceleration and gives Investment Services Companies the ability to choose any entry point with a fully integrated pathway to a unified observability and optimization platform powered by AIOps and automation.

With the Riverbed Platform, Investment Services companies can build actionable unified observability and optimization strategies designed to achieve strategic goals like optimizing the digital experience for wealth managers, accelerating portfolio management applications, and simplifying audit and compliance processes.

To learn more about the Riverbed Platform for investment services visit:
riverbed.com/solutions/financial-services



Riverbed — Empower the Experience

Riverbed is the only company with the collective richness of telemetry from network to app to end user that illuminates and then accelerates every interaction so that users get the flawless digital experience they expect across the entire digital ecosystem. Riverbed offers two industry-leading solution areas – Riverbed by Riverbed, an innovative and differentiated Unified Observability portfolio that unifies data, insights, and actions across IT, so customers can deliver seamless digital experiences; and Riverbed Acceleration, providing fast, agile, secure acceleration of any app over any network to users, whether mobile, remote, or on-prem. Together with our thousands of partners, and market-leading customers across the world, we empower every click, every digital experience. Learn more at riverbed.com/unified-observability