

# *CNI increases competitive advantage with enhanced data access and Business Intelligence*

*mLogica, Inc. deploys the IBM® DB2® Warehouse Starter Edition to consolidate, manage and capitalize on diverse data sources*



*IBM DB2 Warehouse Starter Edition gave Capital Network the opportunity to build a data warehouse at a price they could afford and now they are ready to grow their business and their investments into the future.*

*“The client was very concerned about the high costs and long implementations of data warehousing. Working with IBM DB2 Warehouse Starter Edition, we were able to provide a fully functional data warehouse at a cost they could not believe. The client was amazed at how smooth this went. They are now able to determine their clients’ buying trends, which provides them with a competitive advantage in the market.”*

Vazi Okhandiar, Vice President, Technology

The financial market is one of the most competitive, but potentially lucrative market segments. Billions of Dollars, GBP, Yen, etc are changing hands every day, through funds, stocks, bonds and currencies and thousands of companies make their living in this hotbed of global activity. Delays in providing key information can cost thousands, hundreds of thousands and sometimes millions of dollars. Information is critical, the timing of information is critical and the availability of that information is critical. In order to be successful in the financial market it is imperative you are able to provide up to date financial information for your clients. It can be the difference between a satisfied or very dissatisfied customer.

Nestled in the highly affluent neighborhood of Beverly Hills is Capital Network Inc, a financial advisor offering a wide range of money market funds to it’s clientele. CNI operates in one of the most competitive and potentially lucrative segments of the financial market where information is critical to its success and the financial success of its clients.

CNI, whose principals have over 40 years of industry experience, provide a personalized, money market fund investments advisory service to its clients. CNI offers an online, 7 x 24 trading capability, phone access to its staff to enhance the personalized aspect of their business, plus daily email updates to its customers featuring the latest information on which to make their decisions. CNI offers an extensive range of both onshore and offshore funds with leading names such as Citifunds, Barclays, J P Morgan, Fidelity, Morgan Stanley, UBS and Wells Fargo and as they do not manage any funds they are able to offer objective advice.

With this background and the critical requirement for up to date information, CNI needed to find a system that was capable of providing key information on a timely basis. This is where CNI teamed up with mLogica to review their needs and provide a solution.

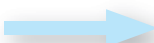
## **An effortless solution from mLogica and IBM**

The first thing that mLogica did was look at the business to best see what was required. This discovery process was critical in investigating the issues and finding the right solution, and it soon became apparent that Capital Network were unable to access or leverage critical information that was located across many diverse sources in a timely manner. CNI were relying on a manual process that took hours and sometimes days.

mLogica recommended IBM’s DB2 Warehouse Starter Edition as the ideal solution to make the performance improvements necessary to allow CNI to develop their business into the future.



**mLOGICA**



# Complex Data Mining production tasks reduced by up to 95%!

## Business Challenge

Capital Network's business was growing with an increasing volume and variety of data within their trade ticketing and financial systems. This increase in business, and the management of it, was starting to highlight serious deficiencies in the structure and integrity of the manual systems being utilized at the time.

**Critical information being disregarded at best... misinterpreted at worst!**

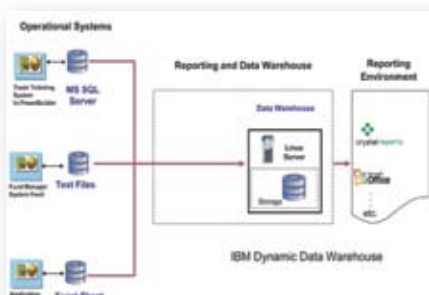
As financial companies thrive on the skillful use of information, without effective management of valuable data, decision making becomes more 'crystal ball' in method. Capital Network Inc were not able to access or leverage critical information that was residing across multiple and disparate data sources in reasonable time... and sometimes not at all! CNI were left with an unacceptable situation that provided incomplete data that took days to compile and needed the support of two people to administer. CNI recognized the potential impact it had on their customers portfolio and financial growth.

## The Solution

Due to the disparate nature of the multiple data sources at CNI, mLogica recommended the installation of IBM's DB2 Warehouse Starter Edition which would allow CNI to consolidate all the data sources into one view and develop an enhanced Business Intelligence capability. Installation utilized Linux servers and IBM Storage, imported data from SQL servers, Text and Excel based sources and exported to a Crystal Reports front end.

Key features of the IBM DB2 Warehouse Starter Edition are:

- Simplifies enterprise Data Warehouse development & Maintenance
- Consolidates multiple, diverse data sources
- Streamlines business intelligence processes
- Boosts data warehouse performance



## Business Transformation

Capital Network were concerned that they had neither the resources nor the technical expertise to implement a data warehouse and the transition would have seriously impacted their business. mLogica had been working with CNI for years providing database software services and therefore understood the customer's business needs and goals.

mLogica provided the initial technology assessment and roadmap, including the infrastructure architecture, warehouse configuration and testing and deployment of the entire solution. This was to be a vital component in the smooth deployment of the system.

With the IBM DB2 Warehouse Starter Edition installed, compilation of the multiple and disparate data sources, which included Financial Systems, Trade Ticketing System and Excel spreadsheets, which had been a completely manual process and had taken hours or even days to compile, would now be available in a matter of minutes or even seconds.

The two dedicated analysts who were used to manage the manual process, were now re-deployed to more impactful tasks producing increased knowledge through improved data mining capabilities.

Now CNI has one of the most innovative and efficient systems available in the market place to manage money market fund investments, with the data analysis tools and systems to back it up.

*"We are a financial services company with an increasing amount and variety of data. We knew that we were not leveraging this data effectively, however, did not have the technical expertise on staff. We have had quite a bit of experience working with mLogica on many data oriented matters in the past. mLogica, in conjunction with IBM, have provided us with an effective and efficient (and low cost!) solution to our warehousing needs."*

Neil Cheatham, President,  
Capital Network Inc.

## Business Benefits

Now that the IBM DB2 Warehouse Starter Edition is deployed and contributing to the business management and growth, significant business benefits are being appreciated throughout the company.

Capital Network Inc objectives of an increase in sales, customer satisfaction and operational efficiency were comfortably achieved, however many other major benefits are now being seen that were not included in the original goals.

- The ability to access complete data on demand to help maximize the value of information assets by delivering business insight to the right people at the right time
- To determine their clients' buying trends, providing them with a competitive advantage in the market.
- The ability to quickly and easily run reports using accurate data from multiple sources to variable reporting environments
- The ability to create new business offerings for their clients.

## Facing the Future...

Capital Network Inc is looking to the future with confidence. They intend to add additional data sources to their data warehouse and are also looking into creating new offerings using the information that is now available at their fingertips.

The IBM DB2 Warehouse Starter Edition will now increase their ability to make intelligent business decisions, and increase company knowledge, based upon actual data. This, in turn, will enable them to easily identify client trends and patterns and adjust financial programs accordingly.

For future growth the system will expand with their needs so that CNI can now concentrate on guiding their business into new opportunities with the knowledge that the information they are using to make these decisions is complete, up-to-date and reliable.

For additional information on how **mLogica** can help your organization, contact us at **(714) 630-2500** or visit our Web site at **www.mlogica.com**

## mLogica and IBM deploying the IBM DB2 Warehouse Starter Edition:

- 95% reduction in Data Mining task reporting
- Reallocation of resources to critical business decision making processes
- Complete, up-to-date, reliable information... on-demand