

## Tricio investment support module Investment product and solutions development



### Our support includes:

- ▮ Advice on how to create in-house products for your clients
- ▮ Help to find and coordinate with third party suppliers
- ▮ Support in dealing with any regulatory and legal documentation
- ▮ Support for your colleagues in managing the project, both for product launch and post-launch management

### Case study

An international security house wanted to create a new investible index for the Chinese stock market based on its superb track record in picking the right sectors. In addition, a UK broker wanted bespoke equity indices to track UK small-cap shares. Gerry Celaya, Tricio's Chief Strategist, was asked to help.

What did Gerry do?

### *An actionable solution*

As a quantitative expert, Gerry worked with his colleagues to help these firms find possible ways to construct their indices. Gerry worked closely with the analyst at the international security house and helped construct a series of indices on an equal-weight basis that highlighted the outperformance that their selections were achieving. Gerry worked with the UK broker to construct their series of indices, which the broker was then able to take over and run on their own.