

Case study

Powering Agile Growth: How Osmosis NL Built a Future-Proof Investment Solution with Bloomberg

Bloomberg & Osmosis NL

Location

Rotterdam, Netherlands

Industry

Investment Management

Customer profile

Osmosis Investment Management NL is a modern fund manager committed to leveraging cutting-edge technology to scale efficiently while maintaining the agility and focus of a boutique operation. With a vision to build an innovative AI-driven research system, Osmosis NL designed its infrastructure from the ground up to empower its analysts and portfolio managers, enabling them to deliver superior outcomes for clients.

Osmosis NL utilizes an integrated Bloomberg solution to build a sophisticated, scalable front-office infrastructure from inception, enabling its portfolio managers to dedicate more time to research and investment decision-making and translating operational efficiencies directly into client advantages.

Customer goals

- To build a scalable fund manager with extensive research capacity and a lean head count
- To avoid legacy system constraints by creating an innovative AI-driven infrastructure
- To enable portfolio managers to focus on research and decision-making
- To translate operational efficiencies into direct financial benefits for clients

Customer challenges

- **Avoid substantial costs:** Circumvent the high expenses associated with purchasing systems from multiple vendors and the subsequent integration and maintenance overhead
- **Eliminate integration complexity:** Prevent the creation of a complex web of interfaces where modifications to one component could necessitate extensive, costly adjustments across the entire technology stack
- **Ensure system cohesion:** Implement a solution where all front-office components work seamlessly together rather than as disparate, bolted-on parts
- **Maximize portfolio manager focus:** Ensure the chosen system would free up portfolio managers from operational burdens, allowing them to concentrate on alpha generation

Osmosis NL embraces technology for agile growth

As a newly established fund manager, Osmosis NL had the unique advantage of designing its technological infrastructure without the encumbrance of legacy systems. Their foundational philosophy was to harness technology to achieve significant research capabilities comparable to larger institutions, yet operate with the leanness and agility of a smaller firm. This included plans for an innovative AI-driven system for credit research and an automated proprietary financial database. The primary goal was to empower analysts and portfolio managers to maximize their time on research and strategic investment decisions rather than system management.

“Our core belief is that the use of technology will help us to scale while maintaining the agility and focus of a small firm. Technology makes a small company big. We are committed to this approach throughout our firm.”

Jankees Ruizeveld, Head of Research and Technology, Osmosis NL

Osmosis NL recognized that a modern, integrated technology stack was paramount to scaling the business efficiently, maintaining agility in a dynamic market and delivering institutional-grade investment processes from day one.

Bloomberg meets the challenge of an integrated future

The primary challenge for Osmosis NL was to build its advanced infrastructure while avoiding the pitfalls commonly associated with traditional IT build-outs in financial services. Osmosis NL needed a solution where all front-office components worked seamlessly together.

The fund manager sought to circumvent the high expenses and integration complexities of multi-vendor approaches and ensure that portfolio managers could concentrate on alpha generation rather than operational burdens.

“We needed a solution where modifications to one component wouldn’t require extensive adjustments across our entire technology stack. The Bloomberg solution delivered a lower total cost of ownership for the IT services of the company.”

Victor Verberk, CEO / CIO, Osmosis NL

Bloomberg delivers a unified and scalable solution

Osmosis NL undertook a thorough evaluation to find a technology partner that could provide a comprehensive, integrated solution for its front-office operations. Bloomberg’s solution was selected as the optimal fit to meet Osmosis NL’s strategic objectives.

Bloomberg delivered an end-to-end solution that consolidated Osmosis NL’s portfolio management, research, trading, risk management and restrictions into a single unified system. This approach immediately negated the need for complex multi-vendor integration projects.

Key components of the solution include:

- **Bloomberg AIM:** Provides leading order and investment management technology, forming the core of Osmosis NL’s front-office operations
- **Integrated analytics and data:** Seamless access to Bloomberg’s portfolio and risk analytics (PORT) and the rich data available on the Bloomberg Terminal®, empowering research and decision-making

This integrated solution provided Osmosis NL with:

- **A unified front office:** A single source of truth and streamlined workflows across all investment management functions

- **Scalability and efficiency:** The ability to grow assets and client numbers without a linear increase in operational headcount or complexity
- **Reduced operational risk:** Fewer manual processes and handoffs, leading to greater accuracy and consistency
- **Global support:** Access to Bloomberg’s extensive customer support network

Operational efficiencies translate to client advantages

The implementation of Bloomberg’s solution has enabled Osmosis NL to realize its vision of a technologically advanced, agile and efficient fund manager. Analysts and portfolio managers now spend significantly more time on value-additive research and investment decision-making. The fund manager can make faster investment decisions and apply changes to its portfolios at scale.

These operational efficiencies translate directly into financial benefits for clients through lower management fees, enhanced research capabilities and improved risk management, all while maintaining institutional-grade investment processes. The robust risk management and institutional-grade framework provided by Bloomberg’s comprehensive solution further enhances potential for performance.

“Our portfolio managers now spend more time on research and investment decision-making rather than managing system interfaces. This integrated approach enables faster investment decisions, allows us to apply changes to portfolios at scale and significantly reduces manual processes.”

Victor Verberk, CEO / CIO, Osmosis NL

About Bloomberg Investment Management Solutions

Bloomberg Investment Management Solutions delivers end-to-end technology workflows. Bloomberg AIM is a leading order and investment management technology solution with multi-asset decision support and portfolio management, order management, trade compliance and post-trade workflows. Bloomberg AIM is used by nearly 15,000 professionals at over 900 client firms globally to manage more than \$22 trillion in assets. PORT and PORT Enterprise provide portfolio and risk analytics with advanced risk and return attribution models across 15,000 firms globally, empowering clients to gain deeper insights into portfolios.

Together, these solutions manage integrated workflows of more than 200 shared clients, including over 100 of the world's top asset managers by AUM.

Take the next step.

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