Client Portal

Our web-based client portal gives our clients the control they need to: run curve shocks, verify cash flow settlements, view daily MTMs, forecast future rates, view trade tickets/summaries, and maintain a document repository. It has been designed with a simple interface, making it easy to navigate and access the information you need, when you need it.

Manual Curve Shocks
Our client portal provides the ability to create scenarios determined by our clients to analyze the impact of individual trade and portfolio changes in value against projected rise/fall in interest rates.

Cash Flow Verifications
Through the cash flow verification tool, our clients are able to verify the accuacy of payments and receipts related to their trades.

Daily Mark-To-Markets
No need for clients to wait for their statement at the end of each month/quarter. Clients will know the values of their trades on a daily basis. This is helpful if they need ad hoc internal reporting, to help verify/anticipate collateral requirements, and to verify the value provided by the counterparty.

Trade Ticket
The client portal acts as a quick reference, or “confirmation”. This one-page trade summary can be used as quick update to management, board members, and auditors.

Document Repository
Clients need a quick and easy way to access their information. Our client portal allows access to all trade documents in electronic format with just a few clicks of a mouse. Our clients can have all their trade and portfolio information in one place with easy access.

Forecasting
Our forecasting tools allows our clients to view forward interest rate and currency exchange rate curves to help them establish a view on future expected rates.

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