



An Introduction to Investance

Banking & Finance Focus

- Investance has over 200 dedicated Business and Technology consultants, focused solely on the banking and financial industry
- With offices in London, New York, Hong Kong, and Paris we are able to leverage an international knowledge base to work with clients on a local and global basis.
- Investance invests heavily in research and thought leadership. Recent examples include COO industry Survey and White Paper on European Fixed Income changes.
- Our broad client experience gives us insight into how others in the industry are dealing with the same challenges as you

Our Services

Conference & Training	Getting the utmost strategic information on the major evolutions of the Financial Industry
Research & Advisory	From client surveys to white papers on the challenges facing the industry today
Operational Consulting	From implementing a business strategy to creating the technology to drive it
Technology Solutions	A dedicated research and development team who can design a custom IT solution

Global Reach

4 established offices

- London
- New York
- Paris
- Hong Kong



Our Clients Include



Our consulting approach centres on the blending of our **deep understanding** of the industry and the challenges it faces, with **industry research and thought leadership** to achieve market-leading **knowledge capitalisation**

Deep Industry Specialists

- Exclusive focus on capital markets – buy side and sell side
- Consultants with in-depth experience in front and back office environments
- Adept at solving our client's most complex business and technology problems
- A focus on industry research and thought leadership

Global Reach

- Offices in North America, Europe and Asia in proximity to our clients' key locations
- Ability to deploy multi-location teams in direct response to our clients' needs
- Collaborative, global working environment for our consultants



The Investance Culture

- Culture underpinned by our core values; Client Commitment, Team Spirit, Initiative and Respect
- Focused on interesting projects and knowledge capitalisation
- Entrepreneurial environment looking to grow
- Our practices enable a culture of knowledge-sharing
- Regular formal and informal meeting encourage collaboration

Our Service Offering

- Strategy & Advisory Consulting
- Business Change and Organisation Design
- Programme Delivery
- Industry Research
- Conferences & Training
- Bespoke Technology Solutions

Knowledge Capitalisation and Research

- Industry Research is core to our service offering
- What our clients really care about – and the reason they come back to us – is the quality of our delivery. And this is underpinned by our knowledge
- The depth of our knowledge and the extent of our industry insight sets us apart from our competitors

- **Our work is solely focused on financial markets**
 - 65% of our business is for Investment Banks, 15% for Asset Managers, 15% Securities Services, 5% Private Banking
- **Our clients give us their biggest problems and we fix them**
 - Operating Models, Process Design, Strategy and Roadmaps, Business Analysis, Programme Delivery, Programme Recovery, Research
- **We are seen as part of the financial markets industry not as a vendor to it**
 - our industry focus, small team size and collaborative culture means we are considered a trusted advisor to our clients not a vendor

Two of our recent pieces of work include...

Our approach focused on understanding the existing nostro management operating models across the four in-scope business lines. Subsequent phases involved defining the target operating model, identifying opportunities and challenges and building the business case

Target Operating Model Definition for a Tier 1 Bank

Our client had launched a Securities Processing initiative to review and consider synergies in the way securities are processed across the Group.

Within that initiative, it was identified that the Nostro Management function is a service performed across four business lines and one that could potentially offer business, organisational and technology synergies.

Our role was to conduct a review of the nostro Management function across the Investment Bank, Private Bank, Asset Management and Security Services business lines to understand the current operating model. Subsequently we defined the Target Operating Model (and associated Business Case) and outlined recommendations for the implementation strategy and roadmap.

FX Front-to-Back review for a Tier 1 Bank

Our client the FX business of a Global Investment Bank was looking to review the existing business model and cost drivers with a view to building out their strategy and investment plan for 2009-10. Key objectives included:

		E-Comm	G11 Forwards	G11 Spot	Local Markets	PB
MO	Team Structure/Trade Analysis					
	Trade Volume and Profitability	Red	Red	Red		
Settlements	Trade Confirmation					
	Cancel and Amend Record		Red			
	Bill Allocation		Red			
	Payment					
Coms	Trade Management					
	Nostro Book Management					
	Client Confirmation Processing					
Finance	FX Hedging					
	Reverse Cash					
	FX Current and Reporting					
	Independent Price Verification					
	Reverse Funding					
Risk	Only Cash Ticker					
	FX Risk Management					
	FX Risk Reporting & Management					
	FX Risk Reporting & Management					

- Review FX operating model from trade inception to settlement
- Trading platform review to improve scalability and optimise processes
- Understand key cost drivers and areas where efficiencies could be realised
- Improve the front-to-back control environment

Investance conducted a global review and assessment of the bank's current state organization, processes and technology infrastructure. We produced future state recommendations which support the business roadmap, removes volume and business mix sensitivity from the organisation, enables a closer integration of the Spot, Options, Emerging Markets and Options businesses and delivers an enhanced control environment

We are looking for excellent people from industry and consulting backgrounds to grow Investance in the UK.

In addition to the consulting skills and business knowledge we look for in our people, we need enthusiastic people who can manage demanding situations, show initiative and have the desire to roll their sleeves up and grow a company.

In return, Investance will provide you with an exciting opportunity to work in capital markets within a collaborative, rewarding and dynamic environment. This is your chance to work at the cutting edge of a growing consultancy business in the UK with the support of having an established global consultancy behind you.

We need people who...

- understand our vision - "get it"
- deliver quality
- take ownership
- build strong relationships
- communicate at a first-class level
- take initiative
- absolutely enjoy consulting and the global financial industry
- make a team

and in return...

- Our clients are major players
- We work in small teams
- The mood is very positive
- We are growing
- The culture is empowering
- We learn from each other
- There is a will to succeed
- We reward strong performance