



# INDIUM



**Indium Delivers  
Next-Gen Application  
Modernization  
for an Investment  
Management Firm**

SUCCESS STORY

## Client Overview

The client stands at the forefront of this dynamic environment, providing a robust suite of wealth management, asset servicing, and asset management solutions designed to address corporations, institutions, families, and individuals' unique needs. By combining deep industry expertise with cutting-edge technology, the client empowers its diverse clientele to navigate market uncertainties, optimize investment strategies, and achieve their financial goals, ensuring the preservation and growth of assets in an ever-evolving global economy.

## Siloed Operations Hindering Efficiency and Delaying Stakeholder Decisions

In an increasingly competitive financial landscape, the client faced significant operational hurdles due to outdated and disconnected legacy systems. While functional in isolation, these systems created inefficiencies that impacted overall performance and stakeholder satisfaction. The client tasked Indium with building a centralized asset engine to serve as a single source of truth, ensuring consistent and accurate data access for fund managers.

### Key challenges:

- 1 Legacy systems segregated asset servicing processes, leading to inefficiencies and delayed stakeholder decision-making.
- 2 Siloed operational operations hindered integration and delayed correct insights for downstream systems.

# Smarter Investments, Smoother Operations: Tech Upgrade Using Mendix

The client's application consisted of various components designed to address the operational requirements of the alternate assets servicing team. Indium's expertise utilized Mendix to develop a unified application featuring multiple modules, each enabling essential functionalities, including the following critical actions:

- ▶ **Auto Document Capture & Document Tracker:** Developed workflows to route diverse document formats to the respective operations teams and tracked incoming documents for accuracy, ensuring seamless operational activities.
- ▶ **Database, Customer Onboarding & Manual Indexing (MIQ):** Migrated data from legacy systems, created a customer onboarding workflow to manage profiles, and mapped documents to appropriate clients, establishing a single source of truth for customer-related activities.
- ▶ **Low-Code Application (Mendix) & Accounting:** Built a Mendix-based application with automated workflows for alternative assets' operations and implemented accounting features to monitor processed and pending documents, enhancing efficiency and transparency.



## Modernizing Applications to Power Operational Excellence

Indium built the application using an agile-based execution model with a 3-week sprint and periodic releases based on product backlogs and go-to-market needs. Revamping the legacy systems resulted in the following:

- ▶ Implementing an alternative asset engine using Mendix significantly expedited time-to-market, resulting in a **40% reduction** in development timelines.
- ▶ Incorporating automated workflows across the application led to a remarkable **50% decrease** in processing time, improving operational efficiency and reducing lead times.
- ▶ The application with automated workflows reduced manual intervention in handling alternative assets' operational activities, **enabling 2x** time and resource savings.
- ▶ By accurately tracking incoming documents, the system improved data quality, enhancing decision-making and operational activities.
- ▶ Automated workflows improved OPEX by ensuring that each operations team received the proper document formats tailored to their needs.
- ▶ The system provided real-time monitoring of document processing, including metrics such as the number of documents processed and pending documents, enabling proactive management and better resource allocation.





## About Indium

Indium is an AI-driven digital engineering company that helps enterprises build, scale, and innovate with cutting-edge technology. We specialize in custom solutions, ensuring every engagement is tailored to business needs with a relentless customer-first approach.

Our expertise spans Generative AI, Product Engineering, Intelligent Automation, Data & AI, Quality Engineering, and Gaming, delivering high-impact solutions that drive real business impact.

With 5,000+ associates globally, we partner with Fortune 500, Global 2000, and leading technology firms across Financial Services, Healthcare, Manufacturing, Retail, and Technology—driving impact in North America, India, the UK, Singapore, Australia, and Japan to keep businesses ahead in an AI-first world.

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