

# Application Story



## TRIGLOBAL CAPITAL MANAGEMENT

Triglobal Capital Management, a Quebec-based financial services company.

### Situation

Triglobal must offer its client superior investment opportunities while reducing risk

### Insightful Solution

- S-PLUS®

### Results

- Proven and reliable financial analytics and visualization capabilities
- A flexible and extensible programming environment
- A single environment for accessing, preparing, modeling and deploying information-rich reports

## Organizational Overview

Triglobal Capital Management, a Quebec-based financial services company, offers a variety of financial products and services to individuals and corporate clients. The company offers investment funds, guaranteed investments, life and health insurance, financial planning, retirement planning, estate planning, RRSP and investment loans.

## The Challenge

Derek Hulley, chief quantitative trader for Triglobal, provides traders with the time-critical information needed to better manage investment portfolios and carefully evaluate new opportunities. For Hulley, determining the best asset mix and investment strategy demands that his team develop and deploy sophisticated analytics that use precise statistical analysis to complement external market validation.

## The Strategy

Hulley searched for an analytic solution that could support the entire data analysis process. He needed software to support data access, preparation, modeling and deployment of statistically-based trading applications using fast-changing financial data. The software package needed to be flexible and extensible in order to consolidate information from disparate databases and easily integrate analytics into the company's existing information system.

"We needed a solution that allowed us to prototype new analytics quickly and to integrate easily into our existing IT infrastructure," said Hulley. "Reliability and precision of the analytics was essential because our trading partners rely on this information to make investment decisions." For Hulley, selecting the right analytic solution would have a direct impact on portfolio returns and Triglobal's profitability.

## Key Benefits

After a thorough review of competitive tools, Hulley selected Insightful's S-PLUS data analysis software because it delivered the following benefits:

- Proven and reliable financial analytics and visualization capabilities that identified current and future opportunities to investment managers.
- A flexible and extensible programming environment for adapting and integrating analytic applications to meet new market demands using existing information systems.
- A single environment for accessing, preparing, modeling and deploying information-rich reports.
- An established vendor of data analysis software and solutions that offered the analytic breadth and depth Hulley needed to successfully meet his business objectives.

## Calculating ROI

S-PLUS delivered significant return-on-investment.

ROI Direct Benefits	Before	After	Results
Better Analytics	Not available	More confident, reliable results and new discoveries made possible by different analyses and views of the data	More accurate predictions enhance trading efficiency
Using resources wisely	Not available before	Can extend analytic reach within his organization	Created a competitive edge by having more time available for the development of proprietary analytics
More confident decision-making	Less powerful data analysis software	Better analytics provide greater insight into research outcomes	Better information faster, enhances and shortens decision-making

## Applications

- Quantitative Trading
- Asset Management

## Products

- S-PLUS®