



Powering Personal Finance Technology Company for Consumer Portfolio & Wealth Management



Client Business Description

- ◇ A Personal Finance Technology Company with products for Consumer Portfolio & Wealth Management.

Background

- ◇ CircleBlack required to develop & enhance a Personal Wealth Management Software System that can be used by a consumer as well as financial advisors.

Challenge

- ◇ Product to be available as a universal web solution that can run on heterogeneous device landscape.
- ◇ Dashboard for Consumers to get an aggregated overview of their wealth.
- ◇ Allow for goal based risk management & wealth tracking.

Idea

- ◇ Devise a mechanism to monitor portfolio assets and allocations.
- ◇ Develop a mobile responsive web solution which could transform multiple data sources into a single response with high availability business end points.
- ◇ Allow consumers to view aggregated portfolio..
- ◇ Devise a client communication tool for Financial Advisors.

Our Solution

- ◇ Setup a Dedicated Offshore Development Center for ongoing Product Development.
- ◇ Developed Feed Processing business layers along with proper client data validations.
- ◇ Separated staging environment for market data and client data.
- ◇ Implemented a mobile and desktop responsive web solution.
- ◇ Transformed many data sources as web services with the help of WSO2 DSS by combining data from multiple data sources in single response.
- ◇ Achieved load balancing, scalability along with fail-over for high availability of business endpoints using WSO2 ESB.

Technologies Used

- Core Java and Spring MVC
- HTML5, CSS3, Java Script and AngularJS
- Tomcat and Apache
- MySQL and Cassandra
- RESTful / JSON, WSO2 Enterprise Service Bus and Data Services Server
- DBFit, JIRA, Confluence, Bitbucket, and Kanban



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