

Croesus Central

Modeling and automated
rebalancing solution



Wealth management solutions



CROESUS

Rebalancing portfolios seamlessly

Today’s markets and demands are evolving fast. Rebalancing portfolios is time consuming and most firms still rely on outdated and costly processes.



Increasing complexity to respect multi-level constraints in decision-making



Limited time to cater to various portfolio structures such as UMAs, UMHs and SMAs

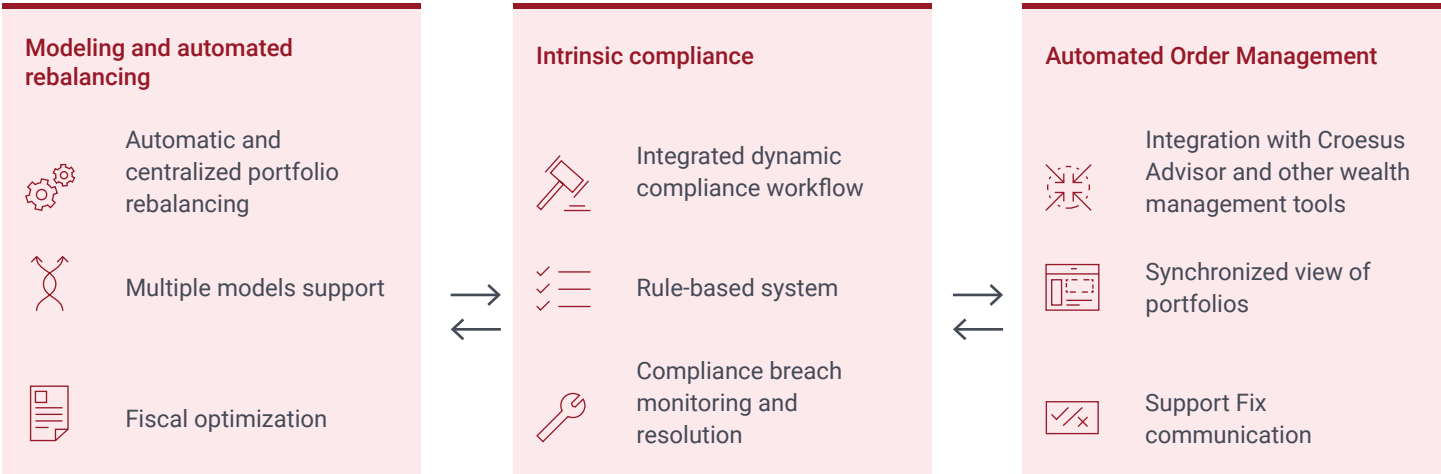


Increased operational cost

Croesus Central is a flexible solution that brings together:

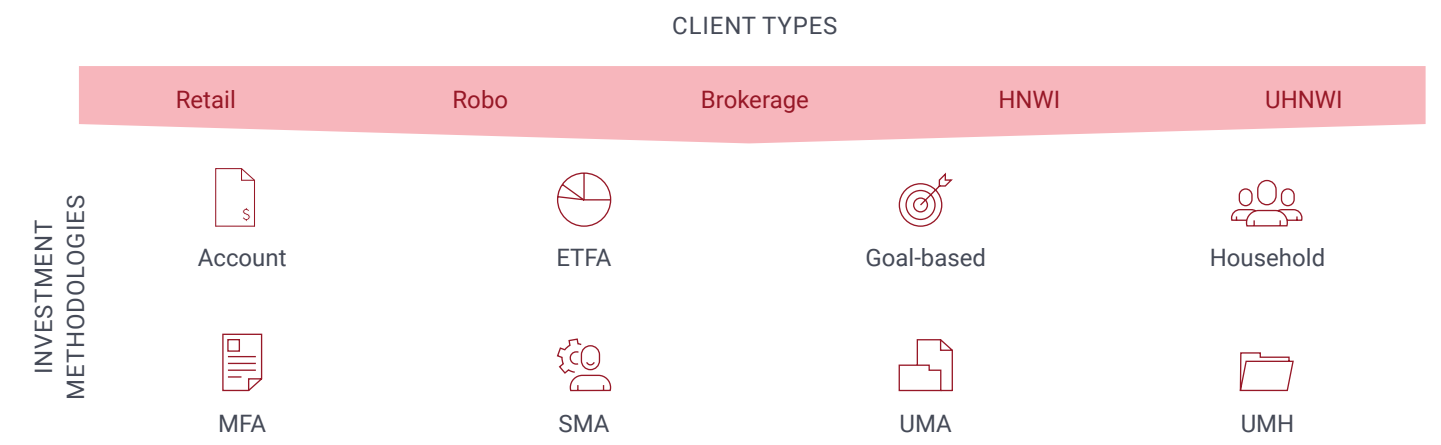
- automated rebalancing
- modeling, and
- compliance management

Croesus Central: automated rebalancing solution



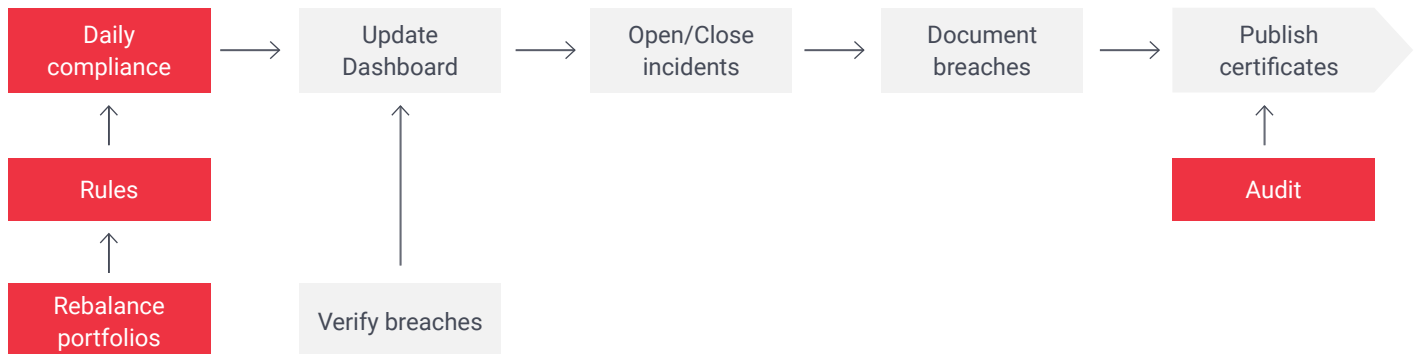
Modeling and automated rebalancing

Croesus Central accommodates a wide range of clients and lets you choose the best way to manage them through multiple models.



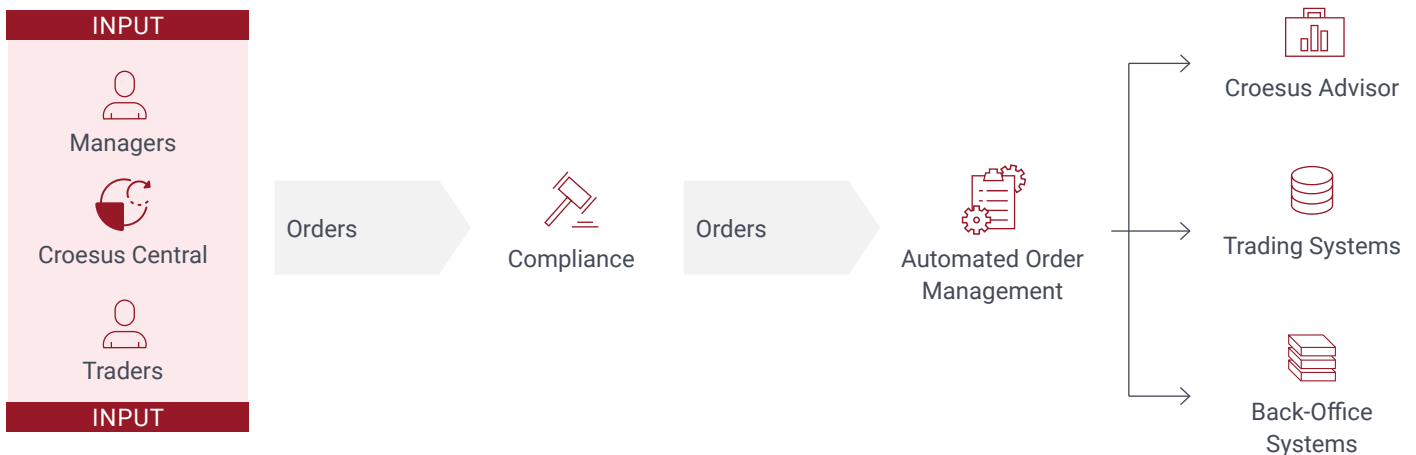
Intrinsic compliance

Integrated compliance workflow gives you all the control you need while aligning the manager's investment strategies with each client's investment policy statements and compliance.



Automated order management

Croesus Central supports many market-leading OMS:



Daily workflow



Croesus Central benefits from the cloud's native advantages and can be deployed in global financial institutions as well as in independent firms.

About Croesus

Pioneers in financial innovation

As a cutting edge WealthTech, we deliver innovative, reliable and secure solutions to wealth management professionals. Engage with us to experience our state-of-the-art solutions.



Contact us

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