



Company
Leading Nordic
Financial Services
Provider

Client Type
Asset & Wealth
Manager

Location
Nordics

Company Size
450+ employees
across 30+ locations

Founded
Over 130 years ago



Case Study

Orchestrating Seamless Automation for Scalable Growth

This organisation is a long-established Nordic financial services provider offering pensions, insurance, and investment services.

As part of its expansion into wealth management, the firm selected FA Solutions to modernise its portfolio management and trading operations, ensuring its systems could scale with rising volumes and future growth ambitions.

Challenge

Manual trading processes could not scale with rising volumes and new strategies.

Solution

Fully automated mutual fund trading through a seamless, ISO-aligned file flow.

Result

Instant trade execution, reduced operational risk, and capacity to scale without adding staff.



Orchestrating Seamless Automation for Scalable Growth

Case Study

The Challenge

Following sustained year-on-year growth, the firm reached a point where its existing trading processes could no longer support rising volumes and increasing strategy complexity. Manual workflows that once worked at lower scale became inefficient, created operational risk, and put pressure on deadlines.

Adding more staff was not a sustainable solution, nor was undertaking costly system replacements or disruptive implementations. The organisation needed a way to evolve its trading operations without increasing cost, complexity, or operational burden — and without compromising client experience.

The Solution

The operations team engaged FA Solutions to enhance the trading workflow. While the initial idea focused on a semi-automated export-import process, it became clear that a more strategic, scalable approach was required.

FA Solutions designed and delivered a fully automated mutual fund trading process, incorporating order aggregation and execution through a seamless file flow. The solution adhered to ISO 20022 standards and accommodated the specific configurations required by the firm's counterparties.

Crucially, FA Solutions delivered this development within its standard release cycle — ensuring rapid time-to-market without disrupting existing commitments. FA Solutions also led all technical coordination with counterparties, reducing the operational burden on the client.

The Result

The automation transformed the firm's trading operations:

- Manual trading processes that previously took around two hours were reduced to an instant "press and send" action, freeing 500 hours per year for higher-value work.
- Operational risk decreased significantly, with automation removing the need for manual double-checks and reducing the potential for human error.
- The firm can now add new portfolios and clients without increasing back-office headcount, supporting scalable, cost-efficient growth.

Within six months, FA Solutions delivered a **fully renovated investment process** that removed bottlenecks, reduced risk, and strengthened the firm's ability to deliver a robust investment experience to its clients.



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