teciem | mada Capital

CASE STUDY

Transforming asset management for scalable growth, control and client service.

How an end-to-end investment platform is supporting Mada Capital to grow transaction volumes and increase operational efficiency.

The challenge

Transforming legacy systems into a cohesive platform.

Before selecting Fusion Invest by Teciem, Mada Capital was operating with a robust fund-accounting engine at its core but lacked the seamless, front-to-back workflow necessary to support its expanding asset- and wealth-management business.

On the asset side, the firm was busy establishing and managing its own funds; on the wealth-management side, it was handling discretionary and non-discretionary portfolios for high-net-worth individuals and institutions. Yet, under the surface of this growth lay a patchwork of systems and some labor-intensive processes.

Winner of the Best in Class Portfolio Intelligence Platform Global FinTech Innovation Awards 2025

Trade Identifiers, portfolio updates and risk analytics all happened manually and daily position files were downloaded into Excel, reformatted, and emailed to portfolio managers and traders – an approach that introduced delays and the potential for human error at every step.

Behind the scenes, back-office activities were handled in two separate systems: a solution for fund accounting and reporting, and another platform solely for client statements. This meant “double booking” each transaction and reconciling inconsistencies by hand, adding yet more operational risk.

On the compliance front, real-time controls were also a challenge. Mada’s teams lacked both pre-trade and post-trade compliance engines and had no automated alerts to flag portfolio drift relative to risk profiles.

Without an aggregated view of exposures – by asset class, sector, currency or geography – portfolio managers relied on static reports to guide allocation discussions.

These siloed tools and manual workflows also threatened Mada’s ability to scale: every new fund, client or trade would demand more headcount and heighten operational risk.

Recognizing these constraints, the firm set out on a search for a comprehensive, multi-asset-class platform that could deliver end-to-end functionality – from portfolio simulation, what-if and order management to compliance, settlement and performance analytics. Their goal was clear: automate the entire trade lifecycle, eliminate reconciliation bottlenecks, and future-proof the business for sustainable growth.

Mada Capital set out with a clear vision to enhance front-to-back office automation, empowering the advisory, asset management, back office, risk management and compliance functions with a unified, data-driven platform.

Now, Mada investment management technology has undergone a major evolution into a powerful platform that supports seamless decision-making and client servicing.

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* previously part of Finastra.

The solution

One platform delivering comprehensive integration — automating front-to-back workflows to power growth and control.

To address its fragmented technology footprint and manual workflows, Mada Capital implemented Fusion Invest by Teciem* as a single, end-to-end, multi-asset-class platform. Rather than layering point solutions over time, the firm opted for a fully integrated, front-to-back architecture that spans portfolio construction through trade settlement and client reporting.

Implementation approach

Mada Capital and Teciem* assembled a small, stable team that included Mada's IT, operations, trading and advisory leads alongside Fusion Invest specialists. Weekly (and occasionally bi-weekly) governance meetings kept all parties aligned on milestones, risk items and scope refinements. A progressive go-live strategy rolled out capabilities in functional waves – first portfolio management and order generation, then compliance engines, execution workflows and finally reporting – minimizing disruption and ensuring on-schedule delivery.

Core capabilities delivered

- **Portfolio management and rebalancing**: Advisors have live access to positions, exposures by stock, sector, currency and country, and real-time risk metrics that were previously made available to the front office daily and on demand via a non-automated process.
- **Order generation and execution management**: Simulations that can quickly be validated and converted to orders have replaced manual ticket-writing, while electronic confirmations flow automatically to counterparties.
- **Pre- and post-trade compliance**: A rules engine now enforces risk-profile tests (aggressive, moderate, conservative) and issues automated alerts whenever a portfolio drifts outside of prescribed limits.
- **Performance, attribution and risk analytics**: Built-in dashboards provide on-demand reporting of P&L attribution, scenario analysis and stress testing, empowering data-driven allocation discussions.
- **Client reporting and dashboards**: Graphical, interactive reports have substituted dozens of Excel workbooks, with automated daily feeds from Bloomberg for pricing and other third parties for fund accounting.
- **Straight-through processing and reconciliation**: Trades execute, confirm, settle and reconcile in a seamless workflow, eliminating manual trade capture and "double booking" across systems.

Scalability and flexibility

Fusion Invest has been set to support equities, fixed income, cash and alternatives and can be configured for future asset classes or business lines. Corporate-action automation, Customer Relationship Management (CRM) integration and customizable workflow rules give Mada Capital the agility to launch new funds or services without rebuilding core infrastructure.

By consolidating front-, middle- and back-office processes onto a single platform, Mada Capital has transformed its operations from resource-intensive, at-risk processes into an automated, scalable engine that delivers real-time oversight, tighter controls and enhanced client service.

* previously part of Finastra.

The delivery journey

From concept to go-live — Mada Capital's Fusion Invest rollout.

Mada Capital's journey to a fully integrated investment platform unfolded through a structured and collaborative implementation process. Driven by the need to replace human-driven workflows with a scalable, front-to-back, automated solution, the project was organized into clear phases, supported by consistent governance and a dedicated Fusion Invest team.

Project initiation and scope

Following a formal RFP, Mada selected Fusion Invest not for the lowest bid but for its long-term fit. Mada's leadership team noted, "It's a solution that we saw will help us grow the business… address our current and medium- and probably long-term business needs. We look at that as a partnership."

The initial scope encompassed portfolio management, trading automation, compliance, client reporting and back-office reconciliation.

Discovery and design

Over several weeks, Mada and Fusion Invest mapped every step – from portfolio construction and rebalancing to post-trade compliance and settlement.

Given the complexity of asset-class support and configurable workflows, the teams held weekly, sometimes bi-weekly meetings to ensure they stayed on track, iterating through multiple design approaches until each business case was fully understood.

Build and configuration

A stable implementation team on both sides delivered rapid, agile progress. By maintaining the same Fusion Invest consultants throughout, Mada avoided knowledge gaps and accelerated issue resolution. When challenges arose – such as hosting-environment stability – buffer time and additional IT support were quickly allocated, keeping the project timeline intact.

Phased go-lives

- **Accelerated initial release**: A basic position-keeping system was delivered in five weeks to support the launch of new money market funds.
- **Core modules launch**: Portfolio management, order capture, compliance gates, reconciliation and settlement feeds went live in the first cut-over.
- **Completion phase**: Graphical dashboards, automated PDF trade confirmations, CRM directory enhancements, Bloomberg integration and corporate-actions automation completed the rollout.

Collaborative governance

Rather than a rigid change-control process, the project embraced collaboration and partnership. Transparent backlogs and regular status calls ensured alignment and minimized disruption.

Milestones and outcomes

Key milestones included fully automated trade-cycle processing, real-time compliance alerts and portfolio performance analytics. Since go-live, Mada can add new funds, onboard high-net-worth clients and process growing transaction volumes with minimal additional resources.

Through disciplined phasing, constant communication and a spirit of joint problem-solving, Mada Capital transformed its operations and set the stage for ongoing enhancements and future growth.

"We are now in a position to really scale up our business... because of the automation of the whole trade cycle, starting from order generation to compliance checks and then execution and back office to reconciliation and settlement."

The result

How Fusion Invest accelerated Mada Capital's efficiency and growth.

When Mada Capital began its journey with Fusion Invest, its front-to-back processes were human driven and hands-on procedures, limiting scalability and exposing the firm to operational risk. Today, thanks to a seamless, end-to-end platform and a collaborative implementation approach, Mada has achieved dramatic improvements across automation, efficiency, risk management and reporting – laying the foundation for sustained growth.

End-to-end process automation

Prior to Fusion Invest, trading, compliance checks, execution and back-office reconciliation were managed in standalone silos.

"We are now in a position to really scale up our business… because of the automation of the whole trade cycle, starting from order generation to compliance checks and then execution and back office to reconciliation and settlement."

Automated confirmation generation and PDF distribution ensure clients receive consistent, timely acknowledgements for every execution.

Operational efficiency gains

Settlement and corporate-actions processing have moved from manual workarounds to fully automated routines, virtually eliminating errors and accelerating time to settlement. A new CRM layer – complete with client tagging, authorization workflows and direct-dial details – has streamlined trader-to-client communication and documentation.

Strengthened risk management and compliance

Fusion Invest's real-time compliance engine now triggers alerts on any deviation from client mandates, empowering advisory teams to act immediately. Pre- and post-trade gates enforce standardized risk-profile tests across aggressive, moderate, conservative and cash-only investor categories, keeping portfolios aligned with mandates and sparking timely rebalancing discussions.

Richer analytics and reporting

Front- and back-office users can instantly view aggregated exposures by security, sector, currency and country – a capability that was not digitized before. Integrated performance, attribution and risk-management dashboards deliver graphical snapshots of book risk and allocation strategy, improving decision-making agility.

Scalability and growth enablement

With Bloomberg integration for new-security onboarding and automated pricing feeds, Mada can add funds, onboard high-net-worth clients and handle rising transaction volumes with minimal headcount increases.

"We are now in a position to really scale up our business in terms of funds and clients onboarded as well as the number of transactions."

Mada's leadership attributes much of the success to Fusion Invest's dedicated project team, which adapted to evolving requirements throughout implementation. "Collaboration and partnership are the keywords," they noted, underscoring that the choice of Fusion Invest was driven by long-term growth and flexibility, not just cost.

This close collaboration between Mada Capital and Teciem* culminated in a joint industry recognition, with both firms winning the IBSi Global FinTech Innovation Awards 2025: Best Portfolio Intelligence Platform award – an external validation of the strength of the partnership and the robustness of the solution delivered.

Collectively, these outcomes have transformed Mada Capital's asset management operations into a unified, scalable investment management platform — fully aligned with its ambitions for efficiency, risk control and superior client service.

* previously part of Finastra.

About

Mada Capital*

Mada Capital is a leading financial services firm committed to creating long-term value for clients and partners.

Backed by strategic global alliances and a seasoned team, the company delivers innovative, tailored solutions across international markets.

With expertise in asset management, corporate advisory and wealth management, Mada Capital empowers clients to take control of their financial future through sustainable strategies.

Trusted by clients worldwide, Mada Capital combines resources, experience, and insight to help achieve ambitious goals.

www.madacapitalfs.com

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1 billion

AuM: AED3.1 Billion ($848m) as per June 2024

Headquarters: Dubai, UAE

Highlighted solution

Fusion Invest

by teciem

Fusion Invest is an integrated, front-to-back investment management platform. It combines portfolio management, order execution, compliance and advanced risk analytics with an Investment Book of Record (IBOR) for real-time data and reconciliation.

Supporting multi-asset coverage and including public and private assets, derivatives and structured as well as sharia-compliant products, Fusion Invest enables intraday analytics, ESG integration, operations and accounting, and automated regulatory compliance, delivering a flexible, collaborative solution for global investment firms.

* stats are true at publication date.

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About Teciem

Teciem is a global provider of front-to-back treasury and capital markets software solutions, serving banks and financial institutions of all sizes. We deliver award-winning solutions for trading lifecycle and risk management, helping clients to operate seamlessly across asset classes and global markets. Built on decades of domain expertise, our solutions – Kondor, Summit, Opics, Sophis, Fusion Invest and Fusion Risk – are trusted by more than 340 financial institutions (and many of their subsidiaries) worldwide, including a majority of the top 100 global banks.

For more information visit teciem.com

Global Headquarters

Teciem, 21 Sackville Street
Mayfair, London, W1S 3DN
United Kingdom