

# Case Study — Asset Management Company

Posidex helps India's leading **Asset Management Company** maintaining its Customer Master Database

## Client's pain points

The client was consolidating its customer databases consisting of millions of records among various portfolios and maintaining a single master database of unique customers by End Of Day (EOD).

However, the client was facing several challenges:

- Earlier solution could not handle the daily volumes and was inefficient in detecting variations resulting in large false positives and duplicate records.
- Inventory of the daily batches for matching and deduplication was piling up and compounding the problem.
- The data received from various users across the country has lot of variations in writing of names and addresses. Cross Matching of multiple addresses based on complex set of matching rules need to be performed in a timely fashion.

## Posidex Solutions

The parent company is a major client of Posidex and has deployed our solutions in several of its groups. The client banked on Posidex's extensive domain knowledge in BFSI and innovative matching and deduplication technologies in handling variations in names and addresses and scaling to voluminous data. Posidex delivered its **PrimeMatch® based Data Management Solution** with powerful **SetMatch** bulk matching engine.

## Results

Using Posidex solution, the client could

- Consolidate and dedupe the humongous data and build the Customer Master Data.
- Process the complex set of Cross Matching rules and generate the Single View of the Customer by End Of Day.
- Prevent inventory buildup with the help of PrimeMatch's high speed of matching on the same existing infrastructure.
- Readily know a new customer and assign a Unique Relationship Number to the customer. If desired, real-time query capability can be integrated

This case study amply demonstrates the complexity of the matching process of creating customer master database as well as progressively generating the customer profile periodically.

## About the Client

Our client is one of the largest asset management companies with branches spread across India. It manages a comprehensive range of schemes meeting the varying needs of its investors. Its parent company is one of the largest private sector giants in India and the client is one of the



## Testimonial

*"We are using PrimeMatch™ product of Posidex Technologies to carry out the one time de-duplication of our customer database and a process is run on a daily basis for incremental matching. The performance of the software in terms of speed and quality of matches is excellent."*  
.....**AVP-IT**

## About Posidex

Posidex provides a suite of solutions using validated and proprietary numeric algorithms that enable companies improve the quality of their data, allow them to aggregate data from silos and manage data assets into a single repository in a very cost effective and efficient fashion. Our clients are among the largest data depositories in BFSI, Government and Healthcare.



Posidex Technologies  
<http://www.posidex.com>  
Email: [contact@posidex.com](mailto:contact@posidex.com)