

**LONVIA Capital uses Amundi Technology products and services since 2020 and benefits from ALTO\* Investment platform, Dealing and Middle Office services operated by Amundi.**

**LONVIA Capital** is an independent asset management company with a long-term investment philosophy. LONVIA Capital is based on a unique investment strategy that Cyrille Carrière and his team have successfully applied for many years in European small and mid-cap stocks. A little more than a year after the launch of its funds, the company manages nearly €350 million. The funds have obtained the SRI label awarded by the French government in November 2021 and are all SFDR 9. The company and its partners are committed to devoting 10% of net income to support medical research, social inclusion and environmental preservation.



### ***What led you to the decision to choose an external solution provider?***

When we started from scratch to recreate a new asset management entity, we met with main Portfolio Management System (PMS) providers in the market, driven by the desire to focus on our core expertise, but also to provide our investors with the best tools in the market. Particularly in terms of solidity, compliance, risk monitoring and day-to-day assistance. This was a challenge because until then we had only met asset managers who were disappointed with their PMS, and we needed a comprehensive tool to use on a daily basis.

***“The proposed innovative front-to-back solution allows us to support the growth of our assets in a strong and secure environment for our customers.”***

**Jean-Baptiste BARENTON, Managing Director of LONVIA Capital**

### ***Why did you choose Amundi Technology and ALTO\*?***

We were looking for a comprehensive solution that would allow us to offer our investors the best services in terms of robustness, compliance, risk monitoring, daily support and to benefit from variable operational and IT costs. We chose Amundi Technology for their deep industry experience, the completeness and the scalability of ALTO\* Investment. We subscribed to the entire Amundi offering, from the portfolio management system to the outsourced trading desk, through the reporting, compliance, and risk monitoring modules and to the outsourcing of middle. In addition to the overall comprehensiveness of ALTO\* Investment, we were seduced by its competitive advantages of user experience, ease of use and reassured by the fact that it was first and foremost made available to the teams of a major asset manager.

*How do you use the platform on a daily basis?*

Benefiting from Amundi Technology's strong implementation capabilities and the deployment of ALTO\* Investment in 5 months, we are now using the platform on a daily basis for all the floors of our core business:



- For **portfolio analysis** and management thanks to all metrics available including allocations, risk, performance data, etc.
- For **order placement** directly linked to the Amundi trading desk;
- For **position keeping, compliance and risk monitoring** such as ratio overruns and liquidity stress tests;
- For the creation of **automated reports**.

Using ALTO\* Investment does not require any dedicated internal resources. The tool is scalable and agile, and benefits from a solid architecture that allows us to reassure our investors and our various partners.

We also benefit from a daily assistance and support from Amundi Technology teams, from the implementation to the daily follow-up, with regular quality committees held. Amundi Technology teams are a real support in the creation of new strategies and we are particularly satisfied with them.

**About Amundi Technology**

Amundi Technology offers **innovative technology and services** to support clients reshaping their operating model. The solutions proposed aim to meet the needs of **asset managers, asset owners, wealth managers, distributors, and asset servicer** in order to provide clients high-performance tools enabling them to focus on their core business.

 <p><b>ALTO* Investment</b> A modular Portfolio Management Platform covering the entire Asset Management value chain</p>	 <p><b>ALTO* Wealth &amp; Distribution</b> A modular core-to-digital platform for Discretionary Portfolio Management and Advisory solutions</p>
 <p><b>ALTO* Employee Savings &amp; Retirement</b> A consolidated management platform for retirement savings</p>	 <p><b>Specialized Solutions</b> A wide range of technology and services leveraging on our experience and know-how</p>

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