



Worldwide Securities and Investment Management Strategies

AN IDC FINANCIAL INSIGHTS RESEARCH ADVISORY SERVICE

How are competitive pressures, technology innovation, and ongoing regulatory changes affecting investments in capital markets information technology (IT)? Accelerating changes in the underlying technologies and market structures for trading equities, fixed-income securities, derivatives, and foreign exchange directly impact the way that securities are analyzed, traded, allocated, and processed. Changing regulatory mandates and risk compliance measures is reshaping how firms approach their business and underlying technology decisions. With a cautious eye on future market growth prospects, firms are still budget conscious and examining their IT budgets with a critical eye toward efficiency and consolidation of resources.

Approach

IDC Financial Insights' *Worldwide Securities and Investment Management Strategies* advisory service examines the impact of trading technologies and market conditions on the technology infrastructures and business models of buy- and sell-side firms, brokers, wealth managers, transaction processors, exchanges, and alternative trading systems. This advisory service is designed to provide global perspectives across all geographies, examining best practices and market leaders, wherever they may be.

Topics Addressed

Throughout the year, this service will address the following topics:

- Front-, middle-, and back-office technologies for electronic trading services
- Wealth management and retail brokerage front-office technologies
- Investment management front-, middle-, and back-office technologies and operations
- Exchange, clearing, and custody operations
- Regulatory and market structure changes
- Information management
- Sustainability

Key Questions Answered

Our research addresses the following issues that are critical to your success:

- What firms show leadership in the development of capabilities that lead to increased market share?
- What practices and technologies are the capital markets firms employing to help innovate and effectively compete?
- How quickly will the capital markets firms adopt new technologies such as OEMS, unified communications, SaaS, and grid or high-performance computing?
- What investments in trading and investment management technologies should firms be considering, and what infrastructure is needed to support them?
- How will changes to market structure affect buy- and sell-side traders and vendors?
- What technologies are being used for improvements in infrastructure, reduced latency, and customer interactions?

Who Should Subscribe

The *Worldwide Securities and Investment Management Strategies* advisory service provides technologists at capital markets firms and management within technology solution providers, which service this market, with ongoing, timely, and relevant information on the development of new technologies, changes in market structure, new regulations, outsourcing trends, and other industry topics of concern to brokers/dealers, investment firms, and exchanges.

Return on Research Investment

Core Benefits:

- Concise briefings and advice on key IT trends and challenges within capital markets
- Exploration of new market opportunities
- Coverage on new or emerging technologies and positioning of established vendors
- Extension of internal market research to validate market strategies
- Guidance for more responsive customer-centric marketing campaigns
- Competitive positioning and recommended partnerships

Standard Subscription Deliverables

IDC Financial Insights values building client relationships and strives to foster a partnership with each client through continuous analyst interaction; timely delivery of current, concise, and relevant research; as well as custom research when needed. Each advisory service delivers strategic research covering business and technology issues. A summary of the basic service deliverables available to subscribers includes the following:

- Analyst inquiry time specific to the advisory service area
- 24 x 7 research access via www.idc-fi.com
- Discounted admission to specific IDC Financial Insights or IDC conferences
- Complimentary forum invitations (Web conferences, industry briefings)

Join Our Community

Our IDC Insights Community is designed to enable technology buyers to engage with our industry analysts, share knowledge and best practices, and connect with colleagues. To participate in our community, members create a profile to:

- Participate in our discussions in our blogs, forums, and polls
- Learn about and share best practices, tips, tricks, and tools related to business/technology alignment
- Network with colleagues and join groups within each industry
- Provide feedback to IDC's industry analysts and hear what we're up to

Visit us at: <http://idc-insights-community.com> and join our conversations.

Related Offerings

Related offerings to our industry-specific research practices include IT Spending Guides — segmented regional and country-level analysis by solution area; Go-to-Market Services (GMS) — a modular set of deliverables to assist clients in extending their market reach, validating their market strategy, and producing more responsive customer-centric marketing campaigns; and IDC Advisory Tools — a growing set of solutions designed to ensure clients that technology purchasing and deployment decisions are optimized. In addition, IDC Financial Insights experts are available for individualized consulting engagements to address specific challenges or to customize the results of our syndicated research offerings.

FOR MORE INFORMATION, PLEASE VISIT WWW.IDC-FI.COM OR EMAIL INFO@IDC-FI.COM.



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