

CASE STUDY II

Revenue Growth for Retail Broker

1mn+ retail clients · Europe

CHALLENGES

The broker wanted to offer more value than execution alone. With more than one million retail clients, the challenge was to provide professional investment research, portfolio insights and relevant trade ideas at scale while creating new revenue opportunities and improving the quality of client assets held in custody.

SOLUTION

PRAAMS helped the broker build a new layer of investment intelligence directly into its mobile and web channels.

- 01 Branded research & risk reports:** Comprehensive coverage of 70,000 global stocks, 220,000 bonds, and 17,000 ETFs, delivered via mobile and web.
 - 02 Client portfolio analytics:** Detailed portfolio analytics in a retail-friendly PDF format, achieving a Net Promoter Score above 70.
 - 03 Client-tailored trade ideas:** Portfolio rebalancing recommendations and intraday, event-driven trade ideas, personalized to each client.
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RESULTS

The broader outcome was not simply more trading. The broker moved closer to an investment-led proposition using institutional-quality analytics to improve client engagement, support advisers and generate additional revenue from its existing client base.

+30%

Increase in revenue
from existing clients

+40%

Growth in interest
income

70+

NPS score on client
portfolio analytics

