



“Genesis understand it all”: how deep market knowledge helped us develop rapid solutions for XP Investments



XP Investments offers personalised solutions in wealth management for individuals, families, family offices and asset managers. The company has always provided a personalised, bespoke service for its client base, and with Genesis, XP Investments is able to serve each of their clients with more detail, relevance, and efficiency than ever before.

See the big picture on one platform

Two XP Investment colleagues Maria Paula Guimaraes, a project manager in technology and Sofia Viotto, an Operations Manager, share their perspective on working with Genesis.

Before using Genesis, the retail arm of XP Investments had several in-house trading platforms. It was difficult to concentrate orders and almost impossible to see the big picture for clients, says Guimaraes.

“Genesis built a platform for us where we can see each portfolio, and act on each portfolio, all within their system. It’s consolidated, simple to use, and it connects to our other systems and our trading desks in Miami and New York.”

- Maria Paula Guimaraes, Project Manager,
XP Investments

Building that first application was not a simple task. “It’s something that requires a lot of knowledge of the market, of the regulations and what we can and cannot do, and the flows that we need to follow,” says Guimaraes. Genesis’ specialist knowledge of capital markets was invaluable for solving the problem.

Genesis has transformed the operational side too. Using the Genesis Trade Allocation Manager, XP has shifted from using a complex set of Excel macros to a single operational tool.

“Now the team can complete the trade allocation process and create the client confirmations in half the time,”

- Sofia Viotto, Operations Manager,
XP Investments.

Scalable and flexible

The scalability and flexibility of the Genesis platform makes it possible for XP Investments to continue to expand on tools and build new functionality. The Genesis solution greatly improves the company's client experience – serving each client a uniquely tailored portfolio report with the right information at the right time.

“We used to send a table like an Excel sheet in the body of an email – so it wasn't really anything, it was very simple and it lacked a lot of information,” says Guimaraes. Now, the portfolio manager tool built on the Genesis platform creates a bespoke portfolio report for every client. It saves the team a lot of time, and gives their clients a lot more detail.

It's all part of the pitch

Not only is the portfolio manager tool a valuable asset for existing clients – it also works well as a sales tool. “That first presentation that we send out to a client absolutely makes or breaks a deal,” says Guimaraes. “It's the moment that XP lives in, and that presentation is an essential part of that first conversation: it's our “point of entrance”. It makes our message much clearer for our clients. It shows that our company is robust, ready to attend to their needs, and make them feel safe with the decision to invest with us.”

Add in machine learning

The Genesis platform makes it easy and extremely fast to extend applications, build new functionality, and gain the competitive advantage. The next step for XP Investments is to start building machine learning and AI into their systems, helping their traders to make better decisions for their clients.

An essential collaborator

Working with Genesis has always been a collaborative partnership. Often a new release from Genesis will help solve a problem that the team at XP didn't realise they had: helping them work faster and more efficiently than ever. “It's been great working with Genesis,” says Viotto. “The platform helped us get a huge improvement in efficiency and automation.”

For Guimaraes, the biggest benefit has been to find a collaborator with such deep market knowledge.

“Genesis are really a partner in our business. They understand it all, and help us see the big picture.”

- Maria Paula Guimaraes, Project Manager, XP Investments

Find out more at genesis.global

