



HiPortfolio

Comprehensive. Flexible. Proven.

商业智能

通过值得信赖的数据进行更快速的投资和决策

旨在提供：

- ▀ 灵活的投资会计及税务数据挖掘能力，加快运营调查
- ▀ 全面的投资运营数据可视化
- ▀ 为决策者和客户服务团队提升数据访问性

位于投资运营的核心

HiPortfolio位于许多资产服务、保险和资产管理公司的投资运营核心。作为值得信赖的交易及持仓数据源，HiPortfolio系统中包含了每天投资决策所需的大量数据。决策者需要及时、准确且值得信赖的数据，此外公司也依赖这些数据从而确保更广泛的投资运营高效且成功的运作。

灵活的数据挖掘：提升运营报告及调查的速度

DST Global Solutions的HiPortfolio商业智能功能支持高效地管理HiPortfolio系统中存储的运营数据。HiPortfolio商业智能提供了一个灵活的环境，支持用户进行数据检索、可视化及交互，执行关键性任务。

商业智能层与现有的IDX与RG互为补充，提供向下挖掘相关数据的能力 – 具备足够的灵活性满足透视需求。用户通过商业智能中先进的筛选及排序功能，能够快速锁定需要查询的信息，并进行分割，从而提供所需的运营数据集。

随着该解决方案的推出，用户可以在不同层级的信息中快速进行数据导航。比如，从估值信息到行业类别，再到单个股票持仓，然后查询具体的价格变动或证券信息。

全面的投资运营数据可视化

HiPortfolio的商业智能层结合了HiPortfolio SmartClient用户界面，具备先进的数据检索及可视化组件，提供了灵活的瘦客户端用户体验，支持图形化显示运营数据。

内置的FusionCharts功能支持以多种方法可视化呈现HiPortfolio里的数据。利用按用户在投资运营中所处的角色所自定义的仪表盘，快速获取和解读运营数据。

为决策者和客户服务团队提升数据访问性

作为值得信赖的投资运营数据源，HiPortfolio里的数据能够供不同的人员使用。HiPortfolio商业智能具备了直接从运营数据源获取数据的能力，能够将数据快速提供给决策者及客户服务团队。直接访问最新的数据有助投资公司精简运营，并为决策者提供更准确且及时的数据，支持其做出明智的决策。

The image displays three screenshots of the HiPortfolio Business Intelligence platform. The top-left screenshot shows a dashboard with various charts and tables, including a pie chart titled 'Portfolio Indication by Security Category' and a table titled 'Transactions by Category'. The top-right screenshot shows the HiPortfolio logo. The bottom screenshot shows a detailed transaction history table with columns for PNL, Security Name, Trade Type, Trade Date, HiPort Trade Id, Nominal, Broker Code, Cost, and Realized G/L.

数据汇总及可视化

HiPortfolio商业智能支持实时的数据挖掘，以及中后台所需的、投资会计相关的查询及调查导航。对于更复杂的投资数据管理难题，DST Global Solutions提供Anova平台，支持各个数据源的数据汇总和可视化，为所有业务用户量身定制。

■ HiPortfolio 界面示例

The image displays three screenshots of the HiPortfolio Business Intelligence platform. The top-left screenshot shows a dashboard with various charts and tables, including a pie chart titled 'Portfolio Indication by Security Category' and a table titled 'Transactions by Category'. The top-right screenshot shows the HiPortfolio logo. The bottom screenshot shows a detailed transaction history table with columns for PNL, Security Name, Trade Type, Trade Date, HiPort Trade Id, Nominal, Broker Code, Cost, and Realized G/L.

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