DORSUM Zrt.

Company introduction

February 2021.

A market leader in the Wealthtech CEE region

DORSUM is a multi award-winning, **innovative investment software provider**. Since our foundation in 1996, we have become **a leading software company in the Central and Eastern European (CEE) region**. Our proprietary investment software family offers **versatile solutions to players in capital markets and wealth management space**, and we support our clients throughout the entire lifecycle of our products.

300+ employees

15mn EUR turnover

clients in **10** countries

3X FINOVATE BEST OF SHOW

banking technology AWARDS 2018

FINANCIAL INNOVATION AWARDS 2017

Winner
Technology Vendors – Best Insurance, Investments and Pensions solution
Presented by The London Institute of Banking & Finance, UK FINANCE

Dorsum INVESTMENT SOFTWARE

Complete support for our partners in the investment market

VISION

Success and growth is determined by how a company deals with its customers. It’s extremely important for financial institutions to pay attention to their customers’ experience: from initial contact, through the process of engagement into the long-term relationship. We aim to provide superb quality of service, in each stage of the customer journey.

MISSION

The Wealth Management industry is going through a major shift, due to a world-wide generation change, the emergence of new technologies and the changes in business models (such as cloud based services). Investing for the Y and Z generations will be just as simple and instant as booking a trip online or listening to music.

We bring the world of investing closer to everyone. We’re a stable partner for financial institutions in the ever-changing investment industry. We deliver high-quality, service based, easy to integrate, modular investment software solutions, to augment our partners’ operational efficiency and to provide exceptional UX.

Multiple award-winning Wealthtech solutions

FINOVATE EUROPE2020 BEST OF SHOW

FINOVATE EUROPE2019 BEST OF SHOW

FINOVATE EUROPE2 BEST OF SHOW

JUNIPER RESEARCH
WINNER
Fintech Innovation

E-BANKING SUMMIT
AWARDS 2017
Best Use of IT in Wealth Management

WealthBriefing EUROPEAN AWARDS 2020
BEST CLIENT COMMUNICATIONS
WINNER
Dorsum

banking technology AWARDS 2018

My Wealth Easy Invest
BEST OF SHOW demó

Communication HUB
BEST OF SHOW demó

Innovative products built for the latest requirements

Wealth Management Platform

The Wealth Management Platform is a new generation, 360 degree, front-to-mid advisory software solution providing essential functionalities with remarkable user experience. This innovative platform is designed for financial institutions to have an efficient wealth advisory network with enhanced customer engagement, while staying compliant with regulations.

My Wealth

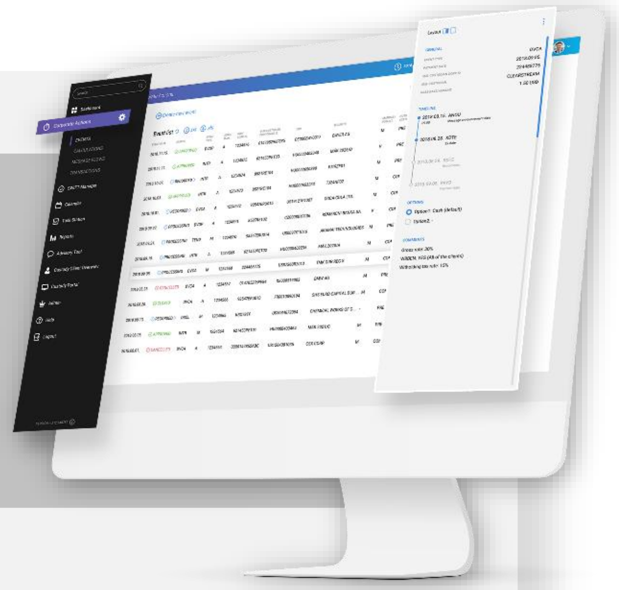
My Wealth is a client facing solution which provides a platform that enables clients to make investment decisions easily anywhere, anytime on this simple and easy-to-use mobile and web platform.

Communication HUB

The Communication HUB features real-time human chat, an integrated chatbot system with pre-prepared tutorials, an AI-driven notification system and GDPR compliant digital document transfer and approval. With the HUB, advisors can reach the mass affluent and private banking segments with digital banking products without losing the personal touch.

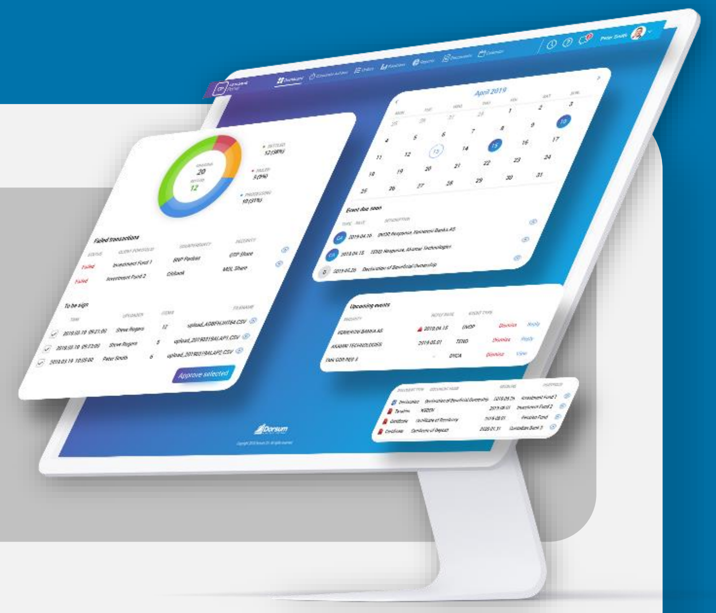
Innovative products built for the latest requirements

CA Master



The software meets the requirements of **SRD II,** capturing and analysing corporate actions data from multiple sources. It **reduces operational risk** and enhances efficiency with its **built-in audit and control functions**. The solution serves **different SLA requirements of local and global custodians** for scheduled and prudent processes. A tax microservice module is included to calculate proper entitlements.

Corporate Portal



The software is offered to securities service providers to serve all types of clients, by offering a **new web-based platform** with flexible widgets representing all back-end functions. **The Portal creates one communication platform for all clients to reduce operational risks**, support full paperless office and increase efficiency.

Case studies – Wealth Management Platform

Raiffeisen Bank International

MiFID2 compliant wealth advisory and risk management process setup and deployment across 5 countries

"We found the best team in size, knowledge and engagement in Dorsum for fulfilling our needs and we chose them because we have seen their dedication and the quality of work they invested in the creation of their products."

MARKUS PLANK
Head of Premium & Private Banking Division
Raiffeisen Bank International

BNP PARIBAS WEALTH MANAGEMENT

Strengthen position as a leading private bank by implementing a new, digital portfolio management solution

"With the current level of digitalization of the industry, it is not enough to focus only on the client facing platforms, but it is also important to give the bank's relationship managers a highly advanced and ergonomic digital platform for their everyday work."

EMILIA JAKUBIAK
Director of Brokerage House
BNP Paribas Bank Polska

otpbank

Equip client advisors with a toolset to see a holistic portfolio overview, and reduce report preparation time

"In line with OTP's values, we sought to enable our RMs to focus on what is truly important – our clients and all their various needs. Partnering with Dorsum allowed us to provide the perfect system for our demands."

CORINA ELENA STOICA
Director, OTP Romania,
Private Banking

Case studies – MyWealth

SARASIN & PARTNERS

Provide a full mobile and web platform to the affluent clientele in Western Europe, enabling the company to become a market leader in digital services and successfully rejuvenate its clientele.

The introduction of the My Wealth mobile and web app with enhanced functionality will result in a modernised digital service for our HNWI customers in Western Europe. The main reason for the decision in favour of Dorsum was their openness to develop a flexible, company branded version of their functionally strong basic product and their agile cooperative partnership.

CUSTOMER FEEDBACK

July, 2020.

K&H KBC

Create a unified platform for premium and private banking customers to et a complete overview about their entire wealth including unit linked insurance products.

"With Dorsum's WMP Client Portal (My Wealth web) solution, not only does customer relationship become better, but the customer engagement shifts to a higher level. Our clients can really get involved personally in seeing how their wealth develops."

FÓNAI IMRE

Head of Digital Channels at K&H Group

TATRA BANKA

Keep up with client expectations and provide full transparency of private customers' portfolio and performance, even in extreme economic times.

„Since the introduction of the My Wealth Client Portal system clients indicated that they really like using the software (even members of management are regular users). The system has been deployed on time, and it runs without any major issues."

CLIENT SURVEY RESULTS

December, 2019.

100% Hungarian owned stable financial background

Ownership structure

- Dorsum is a company with an illustrious past, and a 100% privately owned Hungarian background. Its partners have significant achievements and successes in numerous sectors.