Client Analytics

The power of enterprise data at your fingertips
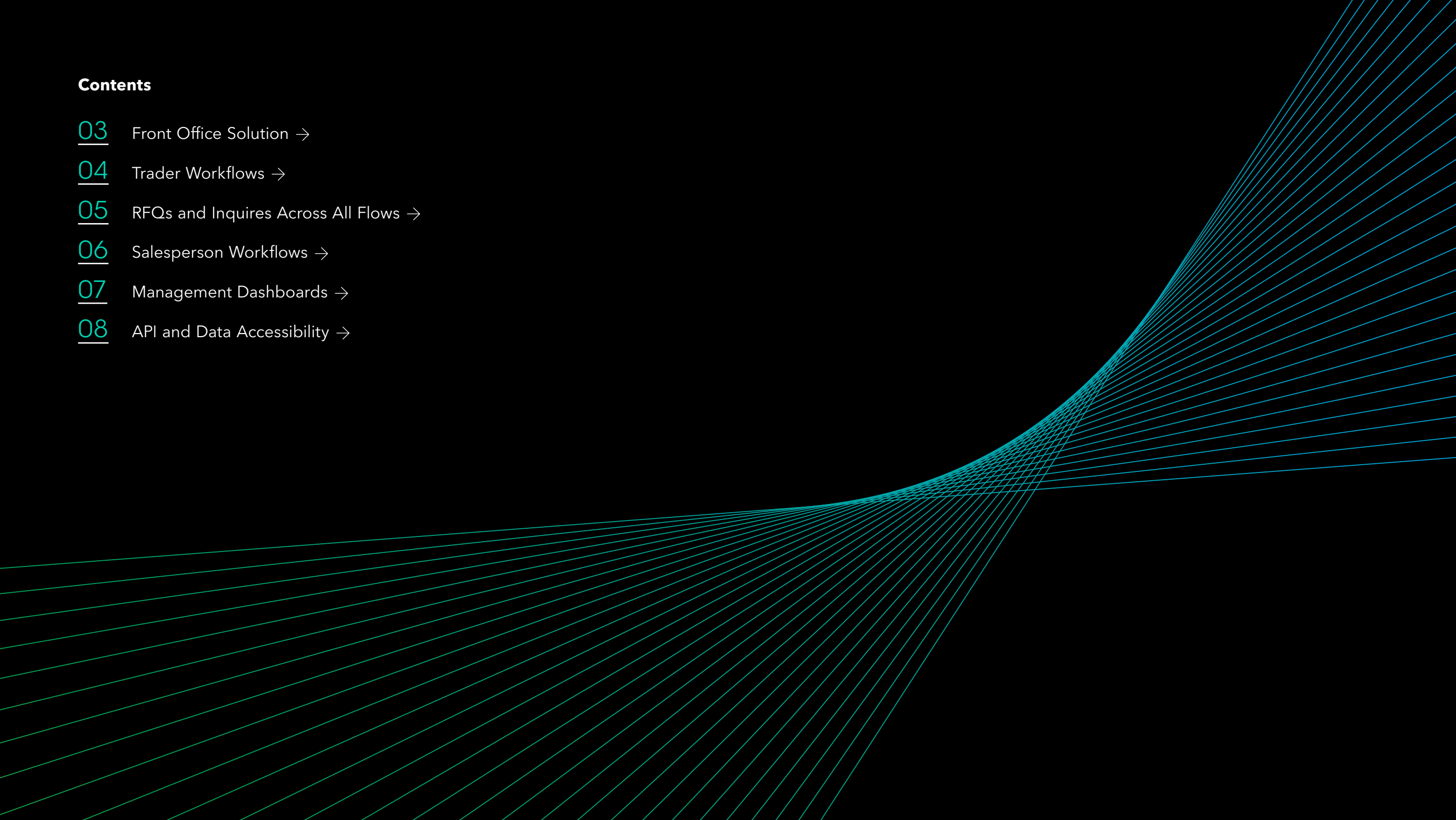
Bloomberg

Contents

Front Office Solution

An enterprise analytics solution that brings together trade event data across all your voice and electronic flows.

Access intelligent decision support analytics for pre-trade, in-trade and post-trade across the front office, along with a robust set of APIs that can plug into the tech stack to provide a seamless integrated workflow.

Enterprise Solution

Sales

Client focus and service

Data driven trading decisions

Trader

Data Analytics

Head of Desk

Business performance and KPIs

Integration with tech stack

Data APIs
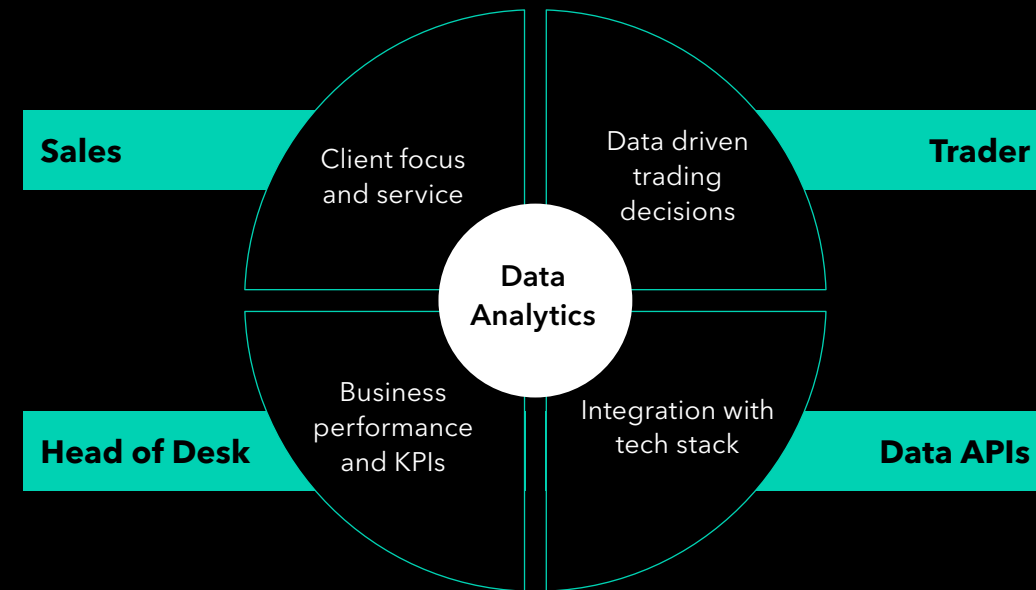
Trader Workflows

Matching liquidity and understanding client supply demand dynamics has never been easier. Send targeted Axes and better manage liquidity distribution with the RUNZ and AXE trader queue.

Features Available:

- Crossing engine
- Client liquidity analytics
- Intelligent AXE workflows
- Automation of voice flows
- Market making pricing tools
- Tracking performance

RFQs and Inquires Across All Flows

See an aggregated view of your client RFQs/inquiries across multiple platforms. Use the notes feature to log and track voice inquiries, while electronic flows from multiple platforms can be tracked and monitored on the Inquiries dashboard giving you an overview of client activity and trends.

- Log and track voice inquiries, creating a daily to-do list for sales
- Track and monitor client trends across inquiries
- Use our integrated connections / FIX feed to consolidate electronic inquiries from multiple platforms in one place
- Aggregate and analyze client inquiries and trends

Salesperson Workflows

Dashboards utilize a client relevance algorithm to analyze client orders and market information, helping sales identify the liquidity most relevant to their clients and prioritize who to contact first.

- Multi-factor client relevance algorithm which analyzes trade history, orders/RFQ, scraped IB and MSG, and notes
- View open and missed orders across the desk
- View priority Axes from your trading desk in real time
- List of accounts to call sorted by relevance per security
- Smart-target RUNZ and AXES distribution based on relevance

Management Dashboards

View aggregated trading data and analytics across the desk to better understand your business. Dashboards display key metrics and trends across your voice and electronic trading flows and communication statics provide a lens into voice flows and client trends, allowing you to drill down to view hit ratios and where clients are active.

- Salesperson performance
- Trading desk performance
- Voice trading statistics
- Aggregated and individual client trends and anomalies
- Client 360
- Ad hoc reporting via BQL
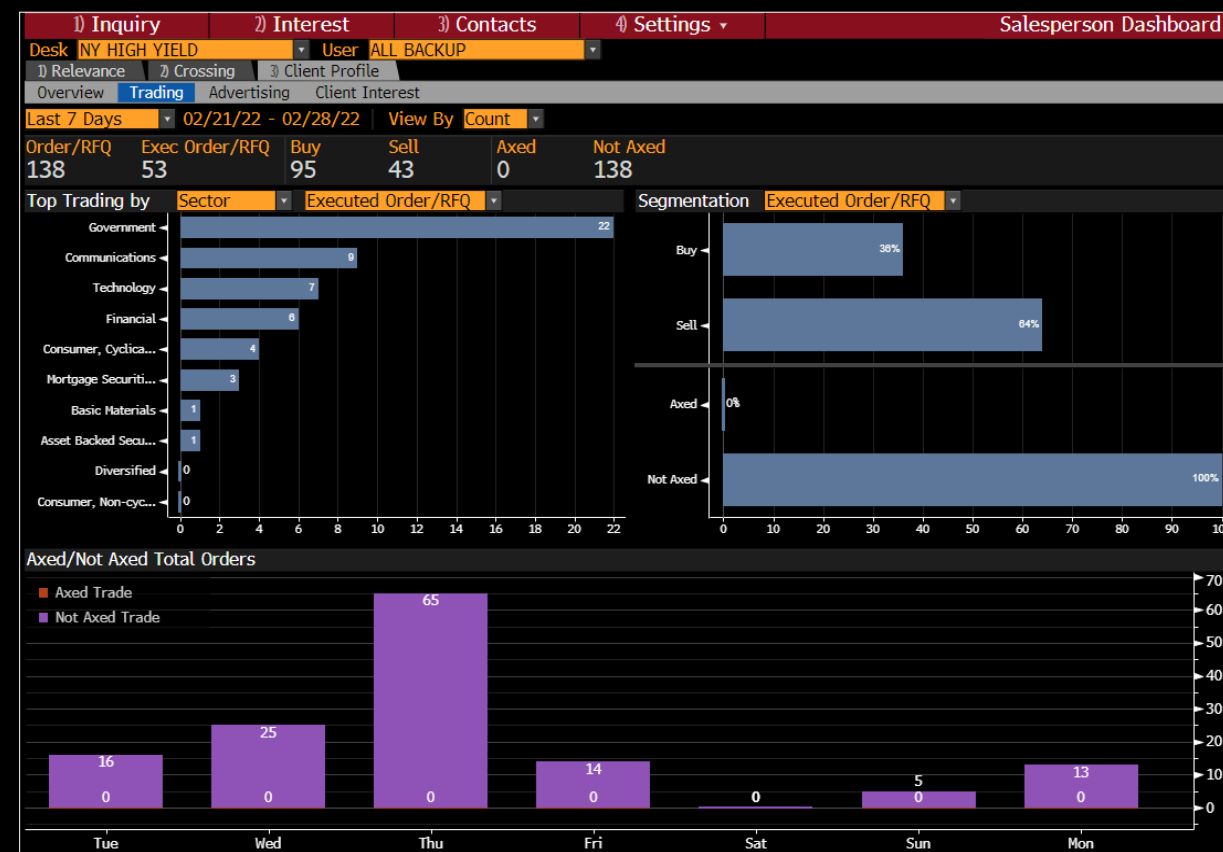
API and Data Accessibility

Access your enterprise data seamlessly with our robust set of outbound APIs. Access a live feed of IB inquiries and security mentions, and nourish your internal analytics, CRMs and pricing models with our consolidated trade feed. Our inbound APIs allow you to keep applications in sync with internal systems or 3rd parties. Real time orders and trade feeds allow for one consolidated view across the desk. Liquidity can be managed centrally with our live Axe and RUNZ feed which provides trading with additional Axe qualifiers that sales can use to better market desk liquidity, for example flagging Axes with a priority status, more behind, all or none, etc.

OUTBOUND

- IB feed of inquiries and orders
- Consolidated trade event feed
- Trade feed with analytics and security enrichments
- Security mention and sales notes

INBOUND

- Live order and trade feed
- Sourcing from 3rd party trading platforms
- Client coverage and tagging
- Axe and RUNZ real time

About the Bloomberg Terminal.

Since 1981, business and financial professionals have depended on the Bloomberg Terminal® for the real-time data, news and analytics they need to make the decisions that matter. The Terminal provides information on every asset class — from fixed income to equities, foreign exchange to commodities, derivatives to mortgages — all seamlessly integrated with on-demand multimedia content, extensive electronic-trading capabilities and a superior communications network.

Take the next step.

For additional information, press the <HELP> key twice on the Bloomberg Terminal®.

Beijing
+86 10 6649 7500

Hong Kong
+852 2977 6000

Shanghai
+86 21 6104 3000

Dubai
+971 4 364 1000

Mumbai
+91 22 6120 3600

Singapore
+65 6212 1000

Frankfurt
+49 69 9204 1210

New York
+1 212 318 2000

Sydney
+61 2 9777 8600

London
+44 20 7330 7500

São Paulo
+55 11 2395 9000

Tokyo
+81 3 4565 8900