



Limina



A Front-to-Middle Office Solution that Empowers Your Team

**Let your team focus on what matters –
producing investment returns with
minimal operational risk**



Limina

About Us

Limina's purpose is to provide the best workflows for modern investment management. Limina is:



Future Focused

Cloud-native, web-based, API driven



Easy to Access

Access anytime, from anywhere



An Agile Partner

Evolving our technology based on client feedback

Examples of problems Limina solves:



Order Planning is Missing Data e.g. when forecasting exposures or cash



Portfolio Data Issues are Found Late, or not Visible in the Front Office



Fragmented Workflows



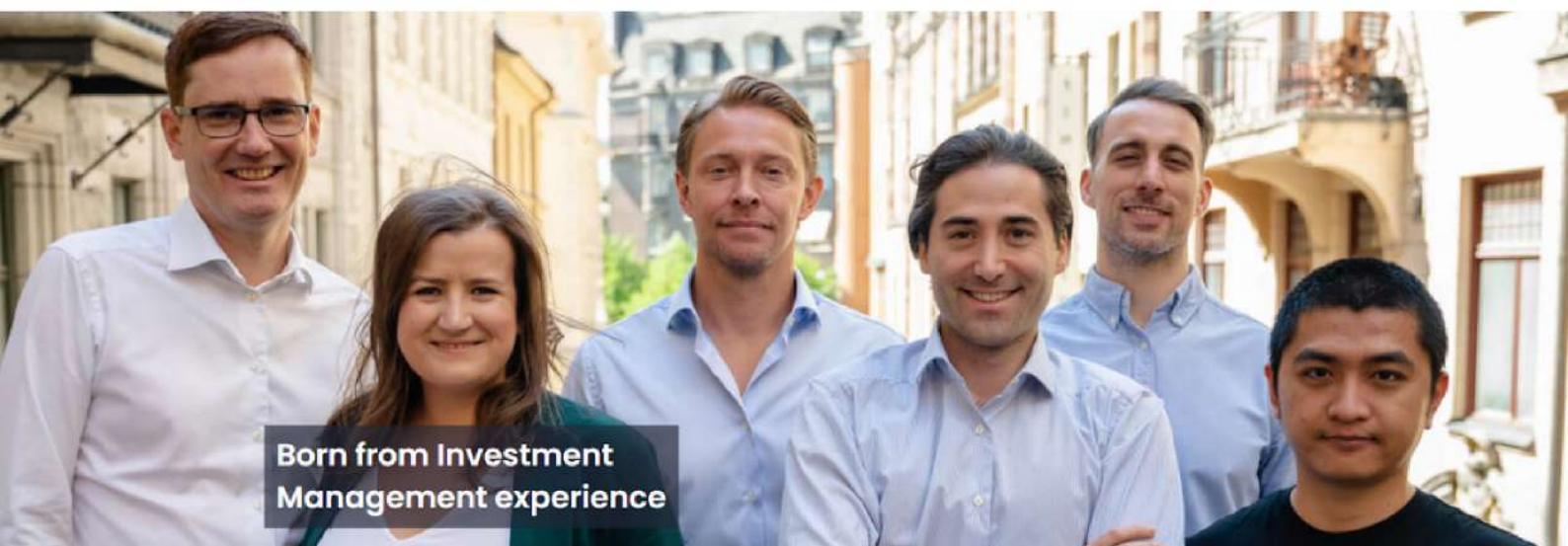
Improved Oversight and Governance

Modernising investment management workflows for asset managers

Established in 2014, Limina caters to small to mid-sized asset managers, leveraging our team's practical portfolio management experience. We understand the challenges our clients face because we've walked in their shoes. Our goal is to empower investment teams, providing more than just a task-driven system.

Recognising the intricate nature of the fund management industry, we believe in tailoring our solution to each client's unique business requirements. Our philosophy sets us apart, and since our initial release in 2015, Limina has been a catalyst for change among our clients.

Our technology is enhanced by collaborative human expertise, as we work hand in hand with buy-side clients to shape workflow solutions. By sharing and applying our collective industry knowledge, we deliver genuine transformation and growth that aligns with the specific needs of each client.





Limina

The Limina Story

Limina was established by investment management professionals who recognised an opportunity to assist investment firms in not only adapting to change but embracing it. We firmly believe that a modern, open platform designed for comprehensive workflows, offering ample flexibility rather than closed, rigid, and fragmented solutions, is the key to empowering investment managers to take control of their technology and operating model.

Based in Stockholm and originating in Sweden (well, sort of – [read our founding story here!](#)), our Swedish heritage deeply influences our culture. We embrace core values such as openness, collaboration, and humility, which guide us in everything we undertake. Having experienced the client side ourselves, we understand the immense value of having a trusted partner who truly comprehends your needs, and that is precisely the role we aspire to fulfil for each of our clients.

Principles

We started our mission in 2014 with a blank canvas and a set of principles that we believe are critical for how an investment management solution (IMS) should be built and delivered:

OPEN

The choice of IMS should not dictate which other providers you can use. We design our platform to be 3rd party-agnostic and embrace connectivity. In doing so, you can design the optimal operating model for your firm and give front office the workflows they need to deliver alpha.

EXCEPTION-BASED

Being able to trust the data in the system is equally paramount for Front Office decisions as well as governance processes. Your team shouldn't have to spend valuable time tracking down potential issues; issues should be found and flagged automatically.

SUPPORTED BY PEOPLE THAT UNDERSTAND YOU

Our Product and Client Relations teams work closely with you and act as an extension of your own team. Our solutions are there to empower users, to make every day at work a bit easier.

HOLISTIC

An IMS should be cross-asset and facilitate holistic workflows, to allow for proper oversight and controls including portfolio compliance. With an open IMS at the core, asset-class specific capabilities such as analytics and execution can be integrated into the workflows.

The Limina Solution

Benefits of an integrated IBOR & OMS

Front Office

- Real-time Position and Cash Balances
- Enhanced Order and Trade Management
- Improved Compliance and Risk Management
- Accurate Performance Attribution
- Seamless Data Flow and Consolidation
- Increased Operational Efficiency

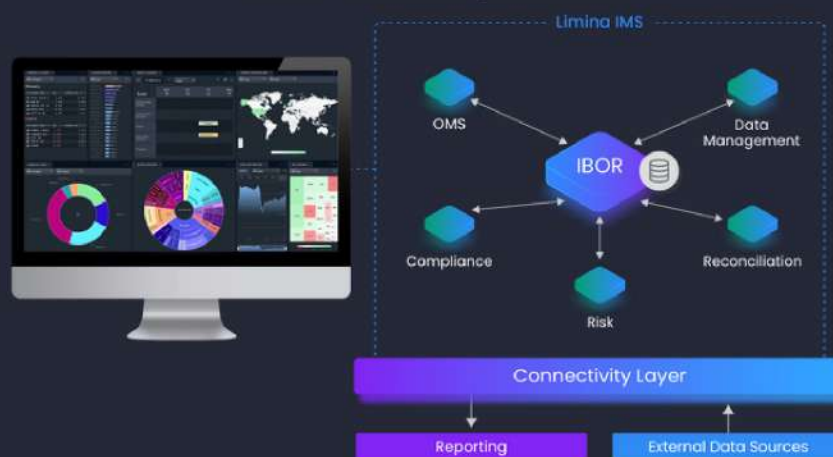
Middle Office

- Accurate and Timely Data
- Efficient Trade Lifecycle Management
- Simplified Reconciliation and Reporting
- Enhanced Risk Management
- Improved Efficiency in Corporate Actions
- Seamless Communication and Collaboration

Data Management

- Data Consistency and Accuracy
- Single Source of Truth
- Efficient Data Flow
- Comprehensive Reporting and Analytics
- Enhanced Data Governance
- Streamlined Data Operations

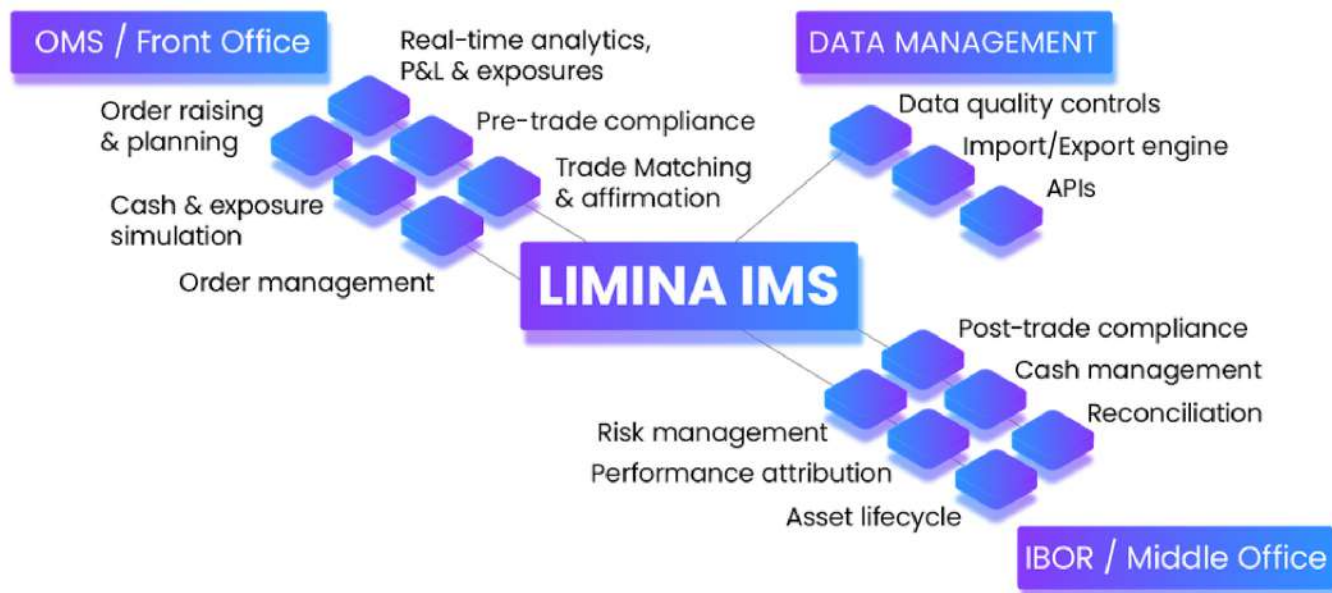
Unified User Experience



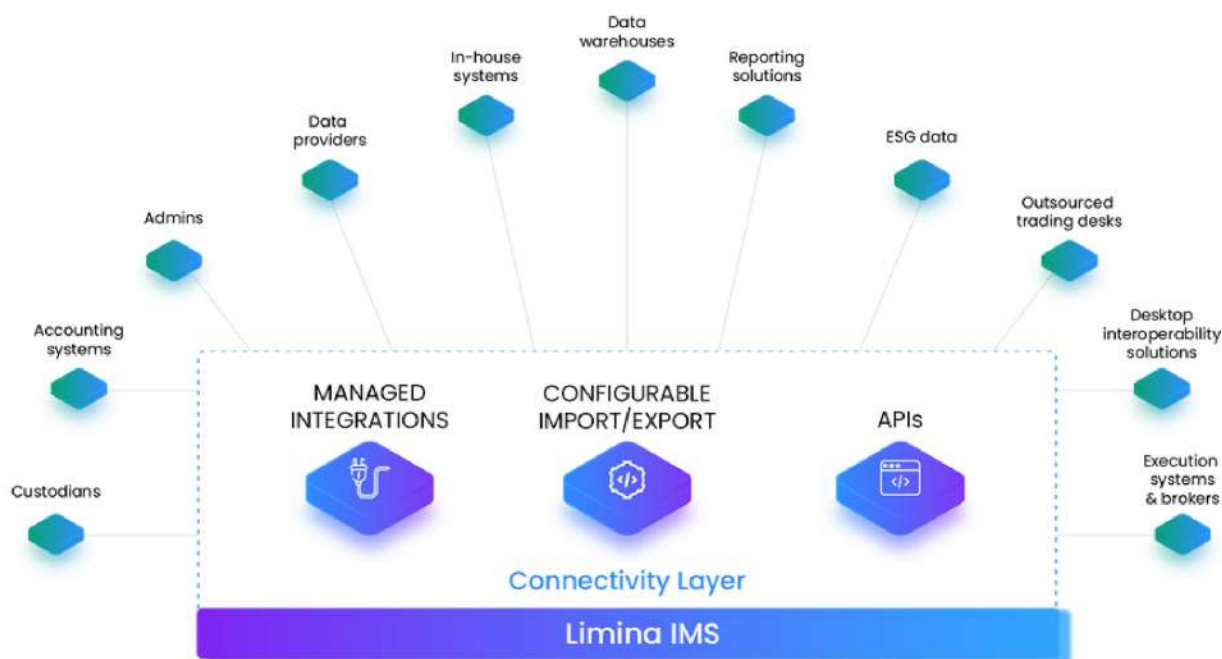


Limina

Features



Open & Unified





Service Organisation

A Partner, not a Vendor

We consider ourselves an extension of our clients' operations team, valuing their feedback in our development strategy. We understand that evolving business needs, new workflows, asset classes, and regulatory frameworks require continuous enhancement of Limina IMS.

Onboarding Services

We prioritise our clients' value maximisation with Limina IMS by offering free implementation services. Collaborating closely during implementation ensures a tailored solution using best practices. Our teams establish effective communication channels for collaboration, problem-solving, and innovation while ensuring comprehensive client training.

Client Services

Our client services team remains available post-implementation to address daily inquiries. What sets us apart is the seamless transition from onboarding to ongoing support, as our implementation and client services resources are part of the same unified team. This ensures the retention of client-specific knowledge and provides consistent support throughout your journey.

Account Management

Our dedicated account managers regularly engage with clients to stay updated on their strategic initiatives. They also facilitate periodic meetings with our senior management team and act as a point of escalation for client concerns.

Operations-As-A-Service

Our flexible Operations-as-a-Service model adjusts to client resource requirements. By leveraging our services, clients can enhance operational efficiency and mitigate key-man risk. We assume various responsibilities on behalf of our clients, such as setting up and maintaining compliance rules, conducting daily reconciliations, and defining new securities.



Limina

Technology & Security

Limina is the world's first cloud-native & fully browser-based Investment Management Solution:



Hosted on AWS

Automatic real-time failover, managed backups



Future Proof Architecture

Micro-services and 100% API coverage



Browser Based

No installed software required



Managed Upgrades

Every 3 weeks or flexible schedule



Secure

SSO, 2FA, Password policies, advanced permission system



Open Architecture

Partner ecosystem and easy to integrate

Access Securely, Anywhere

Our solution offers secure access from any device without the need for software installation, VPNs, or remote desktop solutions. Authentication security measures include two-factor authentication (2FA), single sign-on (SSO), and password policies.

Advanced Role-Based Permissions

Once logged in, our advanced role-based permission system protects all actions and data access, ensuring efficient and low-risk operations for your team.

Comprehensive Data Audit

Data is fully audited, and a history of changes is available within the app, presented in an easily digestible format. This provides transparency and accountability ("who changed what, when").



Robust Hosting Model

Our multi-instance hosting model ensures strict separation between clients' environments. Each client can be upgraded independently, with no impact from heavy loads or risk of data leakage. Hosting securely on AWS Cloud with configurable regions/zones facilitates regulatory compliance.

Automatic Failover & Hot Redundancy

Our hosting employs orchestration services for automatic load-balancing and real-time failover. Multiple instances of services are always running, ensuring uninterrupted service for clients even in the event of service unavailability.

Managed Backups

Daily automatic backups are encrypted and stored securely. Copies of encrypted backups are stored in separate data centres. Regular testing of contingency plans (BCP) ensures preparedness, with no backup restorations needed to date.

Environment Management

New version rollouts undergo extensive automated testing to ensure functionality and prevent unintended consequences. Versions are released to a pre-production (Staging) environment at least one week before the production release. Staging environments receive frequent database updates for up-to-date testing. Test environments are available for longer-term projects.





Managed, Agile Upgrades

Limina is a cloud-based Software-as-a-Service (SaaS) provider, that offers flexible and frequent upgrades. With a single code base, we prioritise rigorous testing to ensure the highest quality solution for our clients.

Trusted Expertise

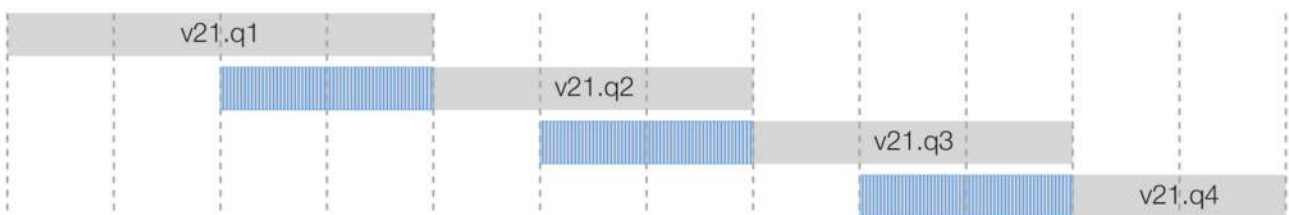
As former investment managers, we understand the challenges of volatile markets and unreliable vendors. For further reading our [Ultimate Guide to Enterprise SaaS & Cloud-Native Solutions for Asset Managers](#) helps you save time and avoid costly mistakes in selecting the right solution.

Tailored Release Management

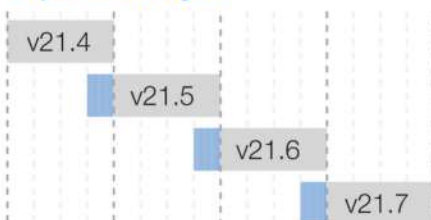
Our adaptable architecture and hosting model allows customised release management. While the standard is a new version every three weeks, we can accommodate less frequent cycles (e.g. quarterly) to align with your operational and change management procedures. This unique combination of frequent releases and tailored deployment cycles defines our "Enterprise SaaS" offering.

Enterprise SaaS Release Cycle

Long Short Cycle



Super Short Cycle



 available for client to test in parallel environment



Limina

Client Testimonials



"We need flexibility, speediness, and someone acting as a real partner."

Francisco Almada, Chief Operating Officer & Chief Financial Officer, Alquity



"We wanted a partner that could grow with us and focus on digitalisation as much as we do; a partner that would value our input, someone we could develop our system with."

Sofia Beckman, CEO of Atle Investment Services



"With Limina, integrations with current systems are easy, and to be able to modify how we work with the functionality was also of great importance."

Maria Wörn, Chief Investment Officer, Avanza



"The move has enabled more efficiencies and automation in dealing and portfolio rebalancing. This has been achieved while at the same time keeping the absolute highest quality in compliance controls that was already in place."

Chris Ellyatt, Managing Director, Genesis



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**For enquiries,
contact us.**



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**Made for investment
managers,
By investment
managers**

Engineered in Sweden – Delivered by
industry experts globally

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