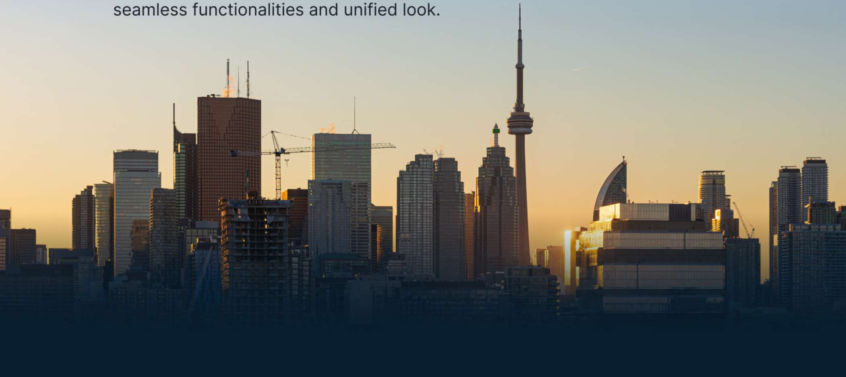
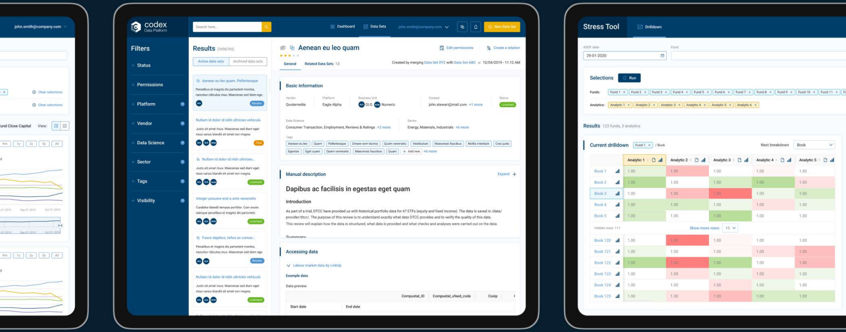
STX Next • 2023

Man Group

Case Study

Leveraging expertise to develop, design, and maintain 16 applications, empowering smarter and more effective investment strategies through seamless functionalities and unified look.




codex
Data Platform
Filters
Status
Permissions
Platform
Vendor
Data Science
Sector
Tags
Visibility
Results
Aenean eu leo quam
Stress Tool
Drilldown
Selections
Run
Results
Current drilldown

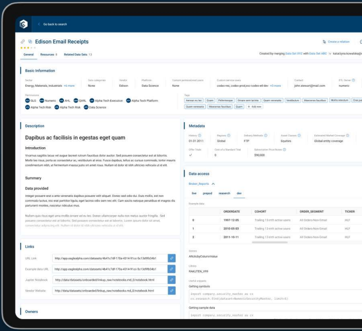
About the company

Man Group is focused on delivering alpha and portfolio solutions for customers. The firm invests across a diverse range of strategies and asset classes, with a mix of long-only and alternative strategies run on a discretionary and quantitative basis, across liquid and private markets.

Industry **FinTech**

Business needs

- Hire a frontend development team with solid experience in building stable and trustworthy solutions
- Create interactive applications that aggregate data, help manage portfolio and provide visualizations



Go back to search

Edison Email Receipts

Create a relation

General | Resources 8 | Related Data Sets 13

Created by merging Data Set XYZ with Data Set ABC by katarzyna.kowalska@

Basic Information

Sector	Data categories	Vendor	Platform	Custom permissioned users	Custom service users	Contact	ETL Owner
Energy, Materials, Industrials +6 more	None	Edison	Data Science	None	codex-res, codex-prod,svc-codex-etl-dev +3 more	john.stewart@mail.com	numeric

Permissions: GLG, Numeric, AHL, QARL, Alpha Tech Execution, Alpha Tech Platform, Alpha Tech Risk, Alpha Tech Risk, Data Science

Tags: Aenean eu leo, Quam, Pellentesque, Ornare sem lacinia, Quam venenatis, Vestibulum, Maecenas faucibus, Mollis interdum, Cras jus, Quam venenatis, Maecenas faucibus, Quam, + Add new

Description

Dapibus ac facilisis in egestas eget quam

Introduction

Vivamus sagittis lacus vel augue laoreet rutrum faucibus dolor auctor. Sed posuere consectetur est at lobortis. Morbi leo risus, porta ac consectetur ac, vestibulum at eros. Fusce dapibus, tellus ac cursus commodo, tortor mauris condimentum nibh, ut fermentum massa justo sit amet risus. Nullam id dolor id nibh ultricies vehicula ut id elit.

Summary

Data provided

Integer posuere erat a ante venenatis dapibus posuere velit aliquet. Donec sed odio dui. Duis mollis, est non commodo luctus, nisi erat porttitor ligula, eget lacinia odio sem nec elit. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus.

Nullam quis risus eget urna mollis ornare vel eu leo. Donec ullamcorper nulla non metus auctor fringilla. Sed posuere consectetur est at lobortis. Sed posuere consectetur est at lobortis. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nullam id dolor id nibh ultricies vehicula ut id elit.

Links

URL Link	http://app.eaglealpha.com/datasets/4b41c7df-170a-4314-91cc-5c13d9fb34b1
Example data URL	http://app.eaglealpha.com/datasets/4b41c7df-170a-4314-91cc-5c13d9fb34b1
Jupiter Notebook	http://data/datasets/onboarded/linkup_raw/notebooks.md_0/notebook.html
Vendor Website	http://data/datasets/onboarded/linkup_raw/notebooks.md_0/notebook.html

Owners

Metadata

History	Regions	Delivery Methods	Asset Classes	Estimated Market Coverage
01.01.2011	Global	FTP	Equities	Global entity coverage

Offer Trials	Cost of a Standard Trial	Subscription Price Notes
✓	0	$90,000

Data access

Broker_Reports

live | prepod | reaserch | dev

Example data:

	ORDERDATE	COHORT	ORDER_SEGMENT	TICKER
0	1997-12-05	Trailing 13-mth active users	All Orders-Non Gmail	HLF
1	2010-05-03	Trailing 13-mth active users	All Orders-Non Gmail	HLF
2	2011-10-11	Trailing 13-mth active users	All Orders-Non Gmail	HLF

Stores

ARcticbyColumnValue

Library

RAKUTEN_V99

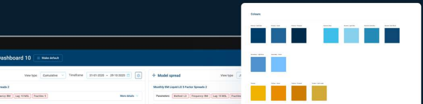
Useful snippets

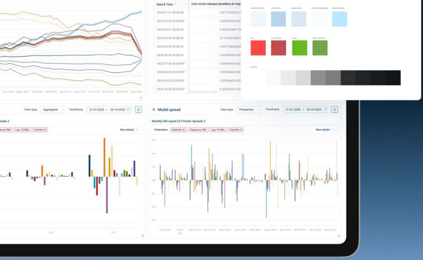
Getting symbols

```
import company.security_master as cx
cx.research.find(dataset=NumericSecurityMaster, limit=5)
```

Getting sample data

```
import company.security_master as cx
```


Colours
Dashboard 10
Make default
View type
Cumulative
Timeframe
31-01-2020 – 29-10-2020
+ Model spread
Monthly EM Liquid LO 5 Factor Spreads 2
More details


View type
Aggregated
Timeframe
31-01-2020 ~ 29-10-2020
More details
Model spread
View type
Timeseries
Timeframe
31-01-2020 ~ 29-10-2020
Monthly EM Liquid LO 5 Factor Spreads 2
Parameters:
Method: LO
Frequency: BM
Lag: 10 MSL
Fractiles: 5
More details

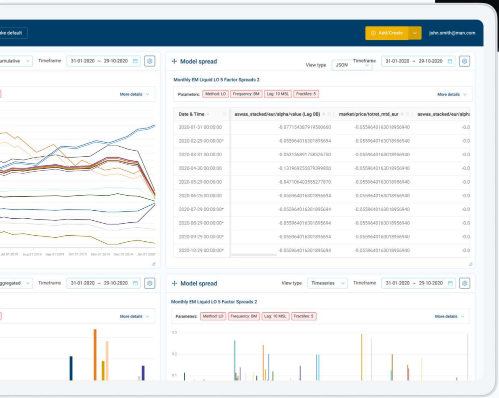
- Streamline the process of building new solutions and improve the existing ones
- Remove information noise by increasing specialists' efficiency
- Unify design and consolidate interfaces across all projects

Industry **FinTech**

Our solution

Our experienced engineers extended the customer's existing in-house backend team, augmenting their capabilities and seamlessly integrating with their operations.

The frontend specialists and designers crafted a set of tools for portfolio managers, implemented interactive data catalogs and dashboards, and redesigned many internal applications.


ake default
Add/Create
john.smith@man.com
umulative
Timeframe
31-01-2020 ~ 29-10-2020
More details
Model spread
View type
JSON
ggregated
Timeseries
Jul 01 2019
Aug 01 2019
Sep 01 2019
Oct 01 2019
Nov 01 2019
Dec 01 2019
Jan 01 2020
0.3
0.2
0.1

Model spread

View type: JSON

Timeframe: 31-01-2020 ~ 29-10-2020

Monthly EM Liquid LO 5 Factor Spreads 2

Parameters: Method: LO | Frequency: BM | Lag: 10 MSL | Fractiles: 5

Date & Time	aswas_stacked/eur/alpha/value (Lag 0B)	market/price/totret_mtd_eur	aswas_stacked/eur/alpha
2020-01-31 00:00:00	-0.077154387919500660	-0.0559640163018956940	-0.0
2020-02-29 00:00:00*	-0.055964016301895694	-0.0559640163018956940	-0.0
2020-03-31 00:00:00	-0.053156891758526750	-0.0559640163018956940	-0.0
2020-04-30 00:00:00	-0.131969255879399800	-0.0559640163018956940	-0.0
2020-05-29 00:00:00	-0.047106403555277870	-0.0559640163018956940	-0.0
2020-06-25 00:00:00	-0.055964016301895694	-0.0559640163018956940	-0.0
2020-07-29 00:00:00*	-0.055964016301895694	-0.0559640163018956940	-0.0
2020-08-29 00:00:00*	-0.055964016301895694	-0.0559640163018956940	-0.0
2020-09-29 00:00:00*	-0.055964016301895694	-0.0559640163018956940	-0.0
2020-10-29 00:00:00*	-0.055964016301895694	-0.0559640163018956940	-0.0

Model spread

View type: Timeseries

Timeframe: 31-01-2020 ~ 29-10-2020

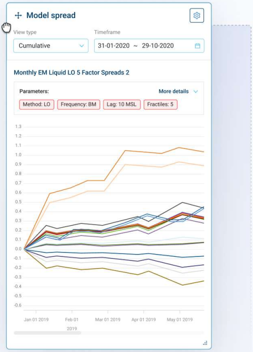
Monthly EM Liquid LO 5 Factor Spreads 2

Parameters: Method: LO | Frequency: BM | Lag: 10 MSL | Fractiles: 5

Through direct cooperation among the team and adaptation of research methodologies, we became partners, not distractors to the end-users, keeping the impact on their daily work at the lowest level possible.

The new tools are user-oriented, with design practices and cohesive branding in mind. They allowed us to increase the expertise value of the solutions and created trust in customers.

Thanks to a systematized buildup process that keeps the interface language consistent, each new project starts more efficiently thanks to a scalable and ready-to-use design system.


More details
1.3
1.2
1.1
1.0
0.9
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
0.0
-0.1
-0.2
-0.3
-0.4
-0.5
-0.6
Jan 01 2019
Feb 01 2019
Mar 01 2019
Apr 01 2019
May 01 2019

Model spread

View type: Cumulative

Timeframe: 31-01-2020 ~ 29-10-2020

Monthly EM Liquid LO 5 Factor Spreads 2

Parameters: Method: LO | Frequency: BM | Lag: 10 MSL | Fractiles: 5

Customer gains

01 Development

Portfolio managers building tool

Streamlined project filtering, risk prediction, resource assessment, and financial parameter analysis.

Enhanced data discovery process

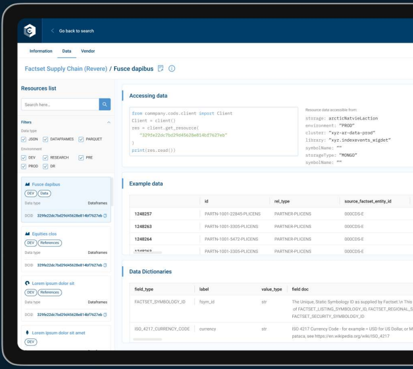
A rich and interactive frontend enabling progress tracking, project analysis, and status checks.

Databases and resources search

Enhanced search functionality supporting efficient resource allocation, management, and efficiency.

Portfolio performance analysis dashboard

A comprehensive tool for portfolio performance analysis, delivering detailed insights and statistics.


Go back to search
Information
Data
Vendor

Factset Supply Chain (Revere) / Fusce dapibus

Resources list

Search here...

Filters

Data type: ☑ JSON ☑ DATAFRAMES ☑ PARQUET

Environment: ☑ DEV ☑ RESEARCH ☑ PRE ☑ PROD ☑ DR

Fusce dapibus (DEV) (Data)
Data type: Dataframes
DCID: 329fe22dc7bd29d45628e814bf7627eb

Equities clos (DEV) (References)
Data type: Dataframes
DCID: 329fe22dc7bd29d45628e814bf7627eb

Lorem ipsum dolor sit (DEV) (References)
Data type: Dataframes
DCID: 329fe22dc7bd29d45628e814bf7627eb

Lorem ipsum dolor sit amet (DEV)

Accessing data

```
from company.cods.client import Client
Client = client()
res = client.get_resource(
  "329fe22dc7bd29d45628e814bf7627eb"
)
print(res.read())
```

Resource data accessible from:

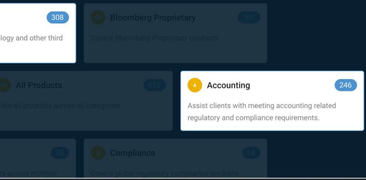
```
storage: arcticNatvieLaction
environment: "PROD"
cluster: "xyz-ar-data-prod"
library: "xyz.indexevents_wigdet"
symbolName: ""
storageType: "MONGO"
symbolName: ""
```

Example data

	id	rel_type	source_factset_entity_id
1248257	PARTN-1001-22845-PLICENS	PARTNER-PLICENS	000CDS-E
1248263	PARTN-1001-3305-PLICENS	PARTNER-PLICENS	000CDS-E
1248264	PARTN-1001-5472-PLICENS	PARTNER-PLICENS	000CDS-E
1248263	PARTN-1001-3305-PLICENS	PARTNER-PLICENS	000CDS-E

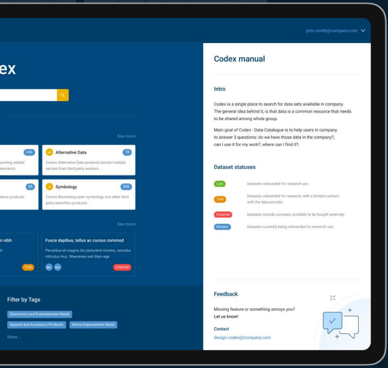
Data Dictionaries

field_type	label	value_type	field doc
FACTSET_SYMBOLOGY_ID	fsym_id	str	The Unique, Static Symbology ID as supplied by Factset.\n This of FACTSET_LISTING_SYMBOLOGY_ID, FACTSET_REGIONAL_S FACTSET_SECURITY_SYMBOLOGY_ID
ISO_4217_CURRENCY_CODE	currency	str	ISO 4217 Currency Code - for example = USD for US Dollar, or M pataca, see https://en.wikipedia.org/wiki/ISO_4217


308
logy and other third
Bloomberg Proprietary
101
Covers Bloomberg Proprietary products.
All Products
612
View all products across all categories.
78
ts across multiple
Compliance
68
Covers global regulatory compliance products

Accounting 246

Assist clients with meeting accounting related regulatory and compliance requirements.


john.smith@company.com
ex
See more
246
ounting related
irements.
Alternative Data
78
Covers Alternative Data products across multiple sectors from third party vendors.
68
iance products.
Symbology
308
Covers Bloomberg open symbology and other third party identifiers products.
See more
m nibh
Trial
Fusce dapibus, tellus ac cursus commod
Penatibus et magnis dis parturient montes, nascetur ridiculus mus. Maecenas sed diam ege.
External
Filter by Tags
Electronics and Entertainment Retail
Apparel and Accessory Products
Home Improvement Retail
More...

Codex manual

Intro

Codex is a single place to search for data sets available in company. The general idea behind it, is that data is a common resource that needs to be shared among whole group.

Main goal of Codex - Data Catalogue is to help users in company to answer 3 questions: do we have those data in the company?, can I use it for my work?, where can I find it?.

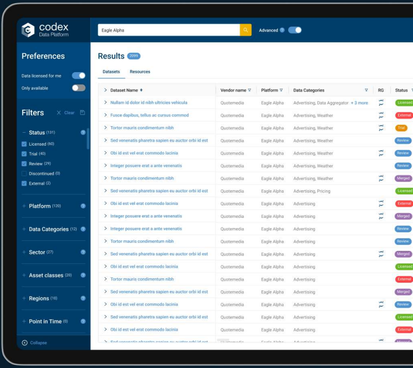
Dataset statuses

Live	Datasets onboarded for research use.
Trial	Datasets onboarded for research, with a limited contract with the data provider.
External	Datasets outside company, available to be bought externaly.
Review	Datasets currently being onboarded for research use.

Feedback

Missing feature or something annoys you? Let us know!

Contact
design-codex@company.com


codex
Data Platform
Eagle Alpha
Advanced
Datasets
Resources
Collapse

Preferences

Data licensed for me: on
Only available: off

Filters Clear

Status (131)
☑ Licensed (60)
☑ Trial (40)
☑ Review (29)
☐ Discontinued (0)
☑ External (2)

Platform (120)
Data Categories (12)
Sector (27)
Asset classes (20)
Regions (10)
Point in Time (0)

Results 2099

Dataset Name	Vendor name	Platform	Data Categories	RG	Status
Nullam id dolor id nibh ultricies vehicula	Quotemedia	Eagle Alpha	Advertising, Data Aggregator + 3 more	⇄	Licensed
Fusce dapibus, tellus ac cursus commod	Quotemedia	Eagle Alpha	Advertising, Weather	⇄	External
Tortor mauris condimentum nibh	Quotemedia	Eagle Alpha	Advertising, Weather	⇄	Trial
Sed venenatis pharetra sapien eu auctor orbi id est	Quotemedia	Eagle Alpha	Advertising, Weather		Review
Obi id est vel erat commodo lacinia	Quotemedia	Eagle Alpha	Advertising, Weather	⇄	Review
Integer posuere erat a ante venenatis	Quotemedia	Eagle Alpha	Advertising, Weather		Review
Tortor mauris condimentum nibh	Quotemedia	Eagle Alpha	Advertising, Weather	⇄	Merged
Sed venenatis pharetra sapien eu auctor orbi id est	Quotemedia	Eagle Alpha	Advertising, Pricing		Licensed
Obi id est vel erat commodo lacinia	Quotemedia	Eagle Alpha	Advertising	⇄	External
Integer posuere erat a ante venenatis	Quotemedia	Eagle Alpha	Advertising	⇄	Merged
Integer posuere erat a ante venenatis	Quotemedia	Eagle Alpha	Advertising		Review
Tortor mauris condimentum nibh	Quotemedia	Eagle Alpha	Advertising		Review
Sed venenatis pharetra sapien eu auctor orbi id est	Quotemedia	Eagle Alpha	Advertising	⇄	Merged
Obi id est vel erat commodo lacinia	Quotemedia	Eagle Alpha	Advertising		Licensed
Tortor mauris condimentum nibh	Quotemedia	Eagle Alpha	Advertising		External
Sed venenatis pharetra sapien eu auctor orbi id est	Quotemedia	Eagle Alpha	Advertising		Merged
Obi id est vel erat commodo lacinia	Quotemedia	Eagle Alpha	Advertising	⇄	Review
Sed venenatis pharetra sapien eu auctor orbi id est	Quotemedia	Eagle Alpha	Advertising		Licensed
Obi id est vel erat commodo lacinia	Quotemedia	Eagle Alpha	Advertising		External

02

Product design

Unified User Interface

Consistent UI across all applications and a versatile toolkit for future app development and redesign.

Risk and portfolio management

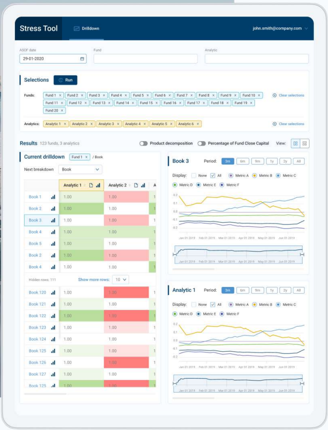
A highly customizable set of widgets and dashboards for each specialist with a standarized and maintained design system.

Data set aggregation

Better data processing and analysis for deeper insights and better-informed decisions following the rule of 'less interface' and putting data and content first.

Funds drill down app

A dense but legible interface giving insights into funds showcasing and performance, helping to identify new opportunities for growth and forecast future performances.


Stress Tool
Drilldown
john.smith@company.com
Run
Clear selections
Clear selections
Product decomposition
Percentage of Fund Close Capital
View:
Book 3
Period:
3m
6m
9m
1y
2y
All
Display:
None
All
Metric A
Metric B
Metric C
Metric D
Metric E
Metric F
0.2
0.1
0.0
-0.1
-0.2
Jan 01 2019
Feb 01 2019
Mar 01 2019
Apr 01 2019
May 01 2019
Jun 01 2019
Analytic 1
Period:
3m
6m
9m
1y
2y
All
Display:
None
All
Metric A
Metric B
Metric C
Metric D
Metric E
Metric F

ASOF date: 29-01-2020

Fund:

Analytic:

Selections

Funds: Fund 1, Fund 2, Fund 3, Fund 4, Fund 5, Fund 6, Fund 7, Fund 8, Fund 9, Fund 10, Fund 11, Fund 12, Fund 13, Fund 14, Fund 15, Fund 16, Fund 17, Fund 18, Fund 19, Fund 20

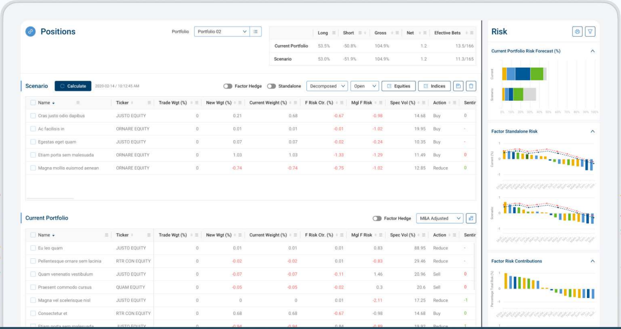
Analytics: Analytic 1, Analytic 2, Analytic 3, Analytic 4, Analytic 5, Analytic 6

Results 123 funds, 3 analytics

Current drilldown Fund 1 / Book

Next breakdown: Book

	Analytic 1	Analytic 2
Book 1	1.00	1.00
Book 2	1.00	1.00
Book 3	1.00	1.00
Book 4	1.00	1.00
Book 5	1.00	1.00
Book 2	1.00	1.00
Book 4	1.00	1.00
Hidden rows: 111	Show more rows: 10	
Book 120	1.00	1.00
Book 121	1.00	1.00
Book 122	1.00	1.00
Book 123	1.00	1.00
Book 124	1.00	1.00
Book 125	1.00	1.00
Book 126	1.00	1.00
Book 127	1.00	1.00
Book 125	1.00	1.00


Calculate
Factor Hedge
Standalone
Decomposed
Open
Equities
Indices
Factor Hedge
M&A Adjusted
Risk
Current Portfolio Risk Forecast (%)
Current
Scenario
Factor Standalone Risk
Current (%)
Scenario
Factor Risk Contributions
Percentage Total Risk (%)

Positions

Portfolio: Portfolio 02

	Long	Short	Gross	Net	Efective Bets
Current Portfolio	53.5%	-50.8%	104.9%	1.2	13.5/166
Scenario	53.0%	-51.9%	104.9%	1.2	11.3/165

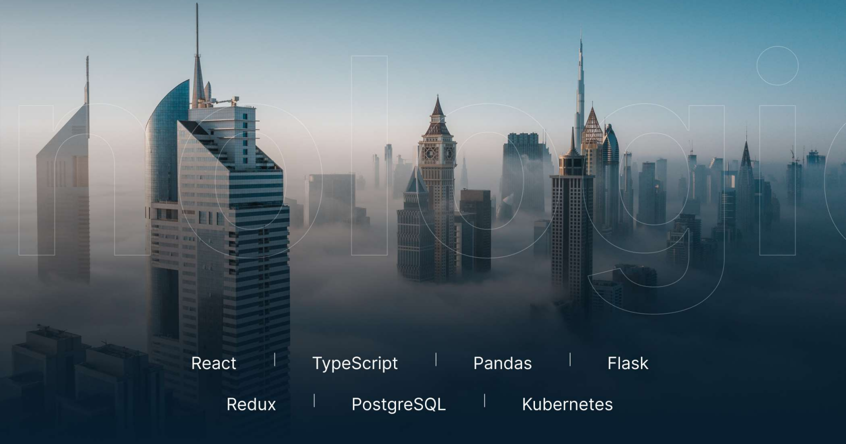
Scenario 2020-02-14 / 10:12:45 AM

Name	Ticker	Trade Wgt (%)	New Wgt (%)	Current Weight (%)	F Risk Ctr. (%)	Mgl F Risk	Spec Vol (%)	Action
Cras justo odio dapibus	JUSTO EQUITY	0	0.21	0.68	-0.67	-0.98	14.68	Buy
Ac facilisis in	ORNARE EQUITY	0	0.01	0.01	-0.01	-1.02	19.95	Buy
Egestas eget quam	JUSTO EQUITY	0	0.07	0.07	-0.02	-0.24	10.35	Buy
Etiam porta sem malesuada	ORNARE EQUITY	0	1.03	1.03	-1.33	-1.29	11.49	Buy
Magna mollis euismod aenean	ORNARE EQUITY	0	-0.74	-0.74	-0.75	-1.02	12.85	Reduce

Current Portfolio

Name	Ticker	Trade Wgt (%)	New Wgt (%)	Current Weight (%)	F Risk Ctr. (%)	Mgl F Risk	Spec Vol (%)	Action
Eu leo quam	JUSTO EQUITY	0	0.01	0.01	0.01	0.83	88.95	Reduce
Pellentesque ornare sem lacinia	RTR CON EQUITY	0	-0.02	-0.02	0.01	-0.83	29.46	Reduce
Quam venenatis vestibulum	JUSTO EQUITY	0	-0.07	-0.07	-0.11	1.46	20.96	Sell
Praesent commodo cursus	QUAM EQUITY	0	-0.05	-0.05	-0.02	0.3	20.6	Sell
Magna vel scelerisque nisl	JUSTO EQUITY	0	0	0	0.01	-2.11	17.25	Reduce
Consectetur et	RTR CON EQUITY	0	0.68	0.68	-0.67	-0.98	14.68	Buy

Technologies used



React | TypeScript | Pandas | Flask

Redux | PostgreSQL | Kubernetes