

deltaBlaze



BDA Bond
Dealers of
America

Sales Manager Roundtable

Technology & Sales

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Technology & Sales

Overview

- ❑ **Account Management**

Inefficient processes create an overload for Sales Managers

- ❑ **Productivity**

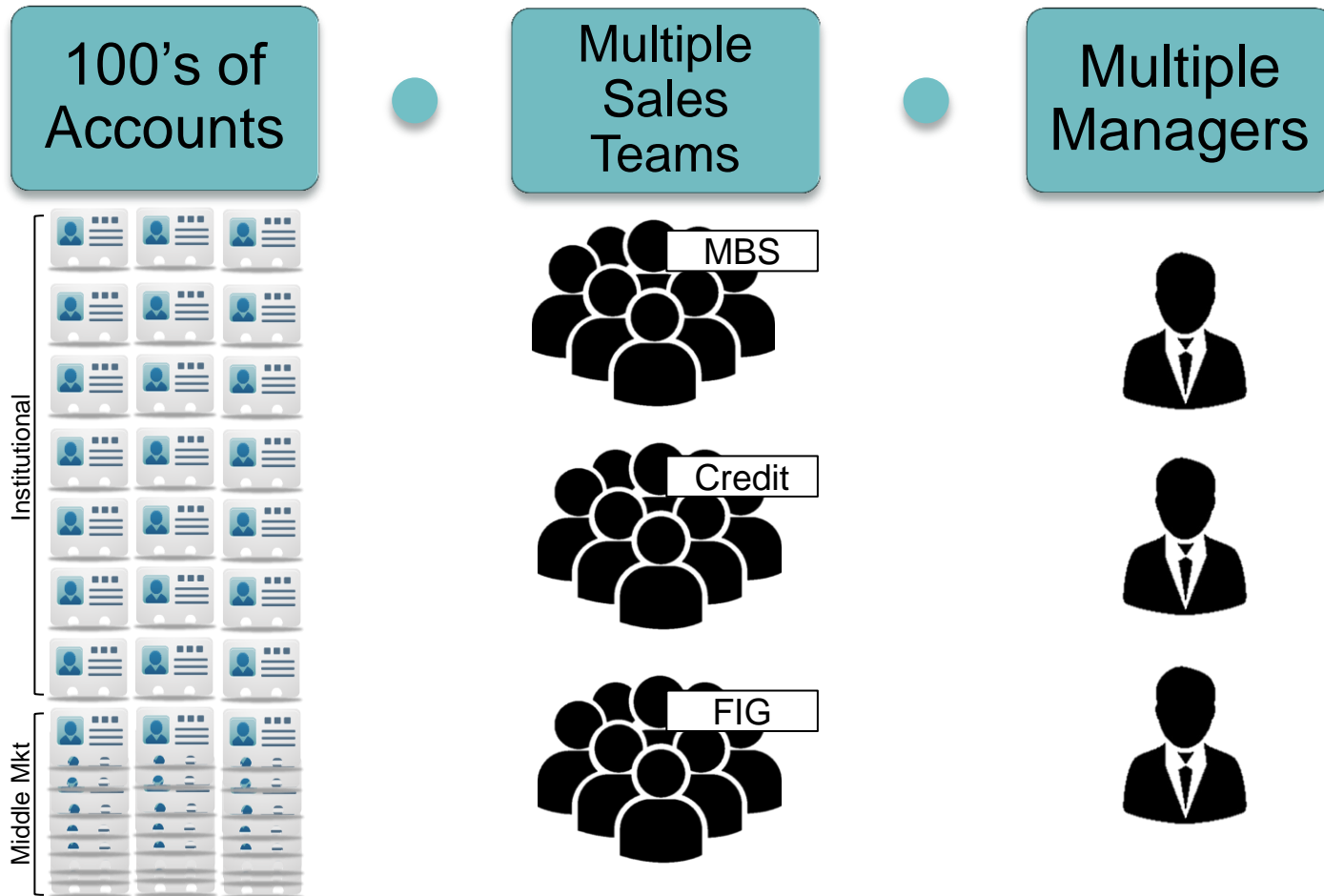
Capturing all of your “Big Data” sources - Connect the dots to cash in

- ❑ **Quality & Performance Metrics**

Automate activity tracking – a more complete view of client engagement

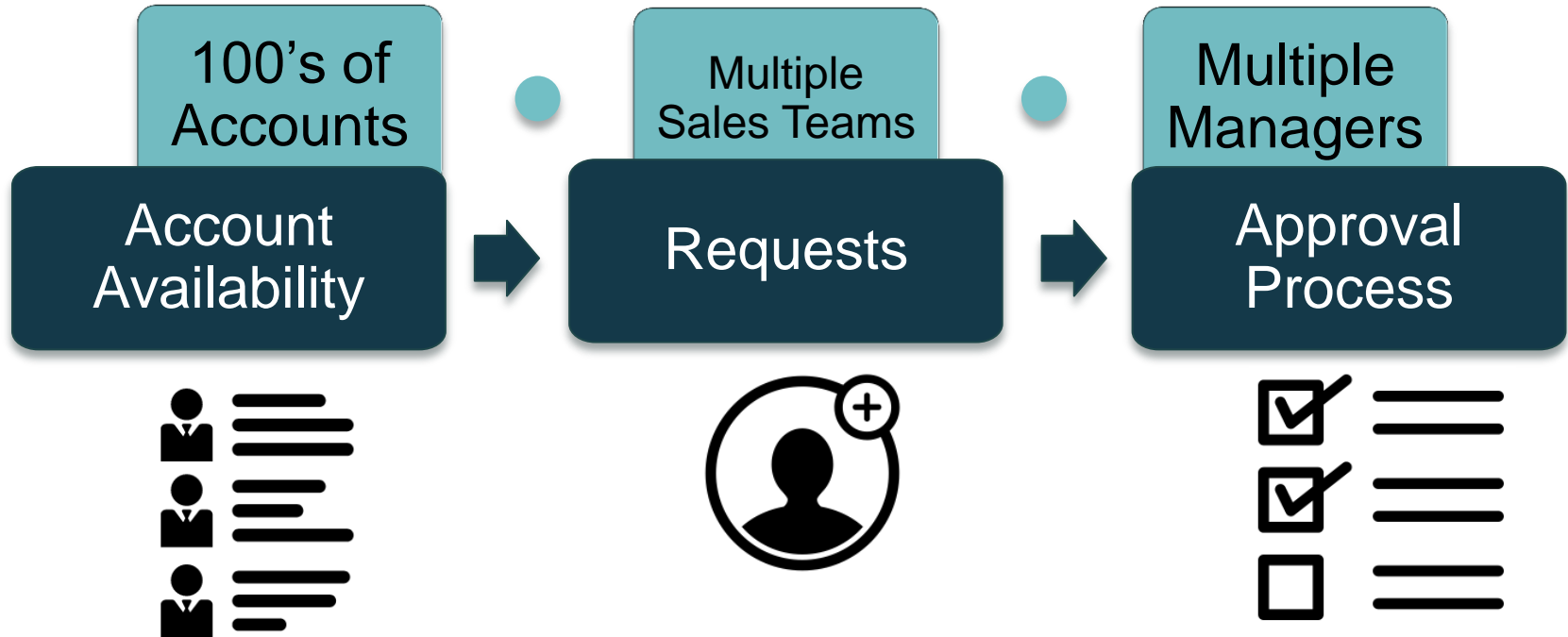
Evolving Sales Coverage Management

Firm structure and coverage models are becoming increasingly complex



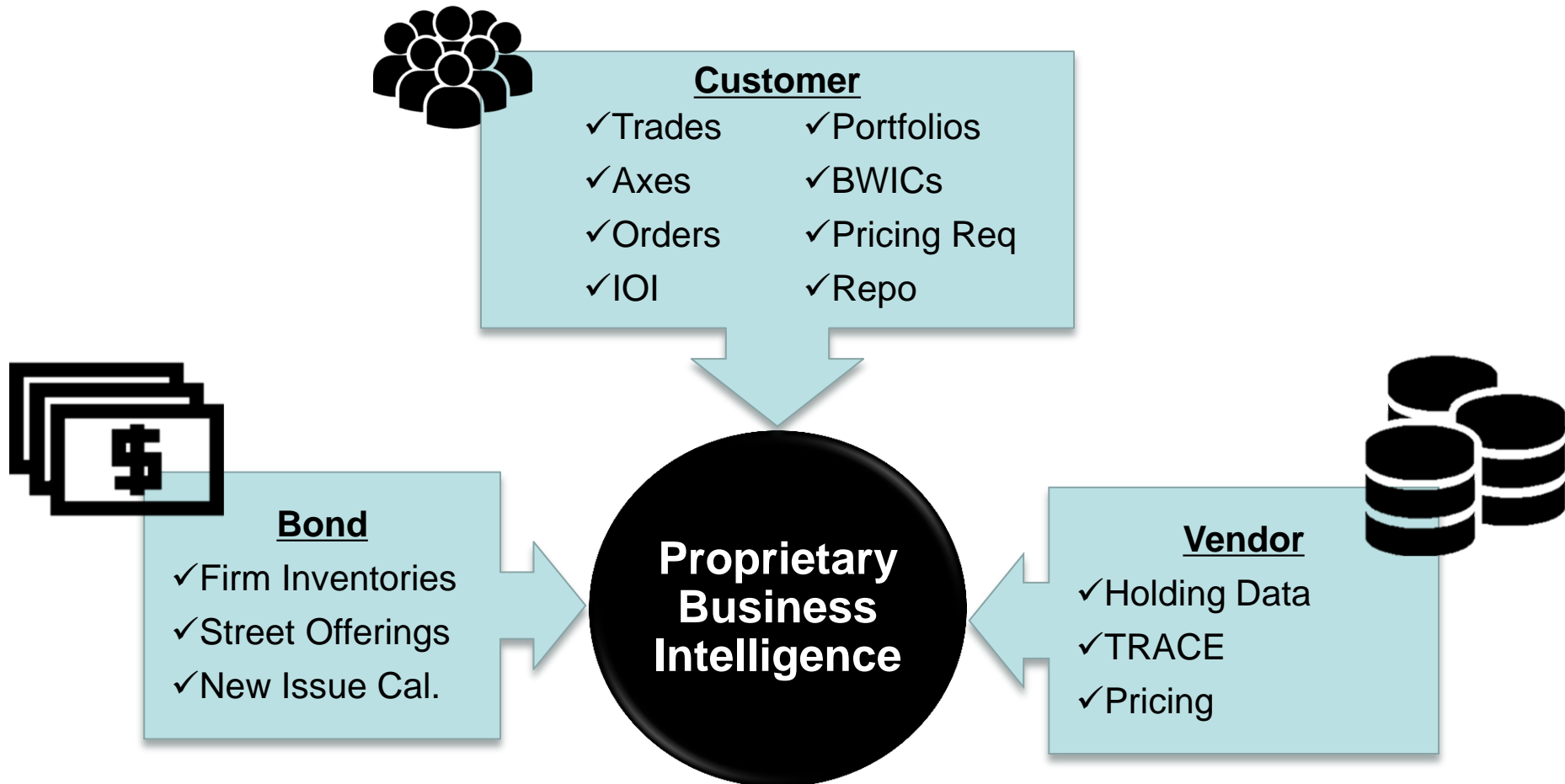
Evolving Sales Coverage Management

Process needs to be simple, visible & transparent



Data Management

Too many sources to manually track efficiently



Leverage Opportunities

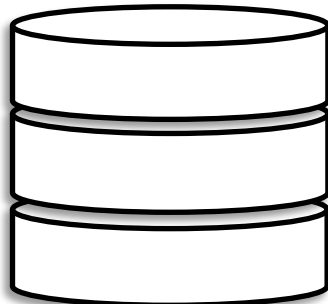
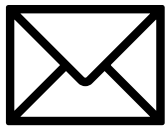
Systems intelligently connect-the-dots

Millions of data points pinpointing trading opportunities



Example1

Client
Email
Received



Intelligent
Proprietary
Database



****Targeted Alerts****

Subject: BWIC @ 4:00PM ** 31mm ** | MIXED BAG |

Cusip	Name	OF	CF	WAL
981464EN6	WFMNT 2014-C A	10.000	10.000	0.294
17305EGA7	CCCIT 2017-A2 A2	9.000	9.000	1.550
03065LAD1	AMCAR 2015-2 A3	4.000	2.054	0.282
29372EBS6	EFF 2016-2 A2	3.160	2.955	1.173
161571GT5	CHAIT 2015-A2 A2	2.000	2.000	0.628
87165LBJ9	SYNCT 2016-3 A	1.800	1.800	2.211
65475WAD0	NAROT 2015-B A3	1.500	1.500	0.736
14313VAC8	CARMX 2015-3 A3	1.350	1.350	0.802
85172LAA4	SLFT 2015-AA A	0.155	0.155	1.263

Fills **Axe** for Metlife

Sold to PIMCO last week
@ \$102-00

Blackrock **holds** 15mm
(HDS)

2mm in **Inventory**, 5mm
more offered in the street

Traced yesterday \$101-00

Leverage Opportunities

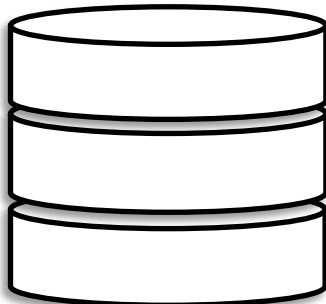
Systems intelligently connect-the-dots

Millions of data points pinpointing trading opportunities



Example2

Internal
Email
Received



Intelligent
Proprietary
Database



****Identified Clients & Sources****

Sell: 5yr DUS bonds at N+30
Buy: 5yr AAA Prime Autos at
N+35

>>> pick up 5bps vs. the
curve, duration neutral

Metlife a **holder** of ten,
5yr DUS bonds

Our firm is **pricing** 5yr
DUS bonds for Blackrock

7mm in **Inventory**, 25mm
more offered in the street

10mm 5yr AAA Prime Auto
BWIC today at 1pm

50mm available to pull out
of client **portfolios**

Performance Metrics

For managers to review account coverage they rely heavily on revenue and account notes – little other activity has been easily accessible

