

CUSTOMER
SUCCESS STORY



Ptarmigan Capital at a Glance

Ptarmigan Capital is a UK-based private investment office established in 2023 by three vision-aligned individuals, each with extensive experience in the financial investment management sector. Their collective vision was to introduce a straightforward, transparent, and client-centric approach, offering personalised services and operating independently, thereby enabling them to impartially source the best investment opportunities for their clients. Distinguishing themselves with a unique model, Ptarmigan Capital aims to foster trust by directly sharing profits with their clients, thus prioritising a sense of partnership and stakeholder engagement. Their focus remains steadfast on delivering exceptional performance, premium service quality, and solid administration to generate long-term value.

Having established a solid foundation, Ptarmigan Capital now harbours ambitions of rapid yet sustainable growth, demonstrating their commitment to expanding their operations and strengthening their position in the investment landscape.

Challenges

To offer the best possible service to their clients, Ptarmigan Capital sought a Portfolio Management System (PMS) that seamlessly showcased portfolios and assets while offering a wide range of functionalities, including risk management tools and day-to-day screening capabilities. Additionally, Ptarmigan Capital recognised the importance of compliance with regulatory requirements and sought a platform that could efficiently address these obligations.

Furthermore, in pursuit of their ambitious business growth objectives, Ptarmigan Capital aimed to leverage a high-performance and intuitive PMS. They also wanted to be able to offer a client portal that provided clarity, serving as a powerful tool for attracting new clients. Cost-effectiveness was of course a key consideration, with Ptarmigan Capital prioritising a solution that offered maximum value.

Solution

In response to these challenges, Ptarmigan Capital conducted a thorough evaluation of several PMS providers. Operating as a small structure, they sought a performance platform at a reasonable price, ultimately selecting WIZE by TeamWork based on the recommendation of a fellow UK-based family office.

“Throughout the implementation process, WIZE distinguished itself through exemplary communication and support. They facilitated a seamless roll-out, offering guidance and coaching to ensure the safe

and effective utilisation of the platform. Additionally, WIZE provided a testing environment, allowing for exploration and experimentation without risk. The ongoing support provided by WIZE proved invaluable, assisting in navigating the system and addressing any queries or concerns that arose along the way."



"As a small structure where time is at a premium and resources are limited, having the support of a technology provider like WIZE is incredibly reassuring. While we recognise the need to further engage with the platform to unlock its full potential, we feel confident in our ability to maximize its benefits."

William Davies, Ptarmigan Capital

Results and Benefits

Still in the early stages of their journey with WIZE, Ptarmigan Capital has already found that the portfolio management screens have proven to be indispensable assets. With dedicated tabs for wealth and performance tracking, coupled with intuitive categorisation features, the platform allows effortless organisation and analysis of financial data. The automation and centralisation of data minimises errors and provides clarity in the analysis of revenues and portfolios, whilst providing clients with easy access and oversight of their financial information. This not only fosters trust and confidence but also serves as a powerful tool for showcasing WIZE's technological capabilities to prospects, thereby multiplying the potential to attract and retain clients.

Perspectives

Ptarmigan Capital is entirely satisfied with the technology, supported by an excellent network and a suite of functionalities. Additionally, the partnership between Ptarmigan Capital and WIZE is strong, allowing transparent communication and great support.

Looking ahead to 2025, the ambition for Ptarmigan Capital is to onboard ten new clients and to start using WIZE to send orders in Straight Through Processing to custodians instead of logging into custodian portals directly, hence streamlining the process and further digitize the order management for greater efficiency and security. With the ambition that WIZE will become a daily staple in their operations, Ptarmigan Capital keeps delving into the solution to further enhance their capabilities and drive their success in the foreseeable future.

About WIZE



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