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Odycey: Wealth Management, Reimagined

Odycey is our wealth management platform, built to bring client onboarding, portfolio management, advisory, and reporting together in one connected environment. Odycey is modular and end to end, connecting front office, middle office, and back office within a single digital environment. It gives wealth managers the insight and control to deliver personalised client experiences, manage portfolios efficiently, and scale with confidence. The modular build enables Odycey to connect straight into Huston, our life and pensions platform, supporting insurance linked business.

Our Vision

Empower financial services organisations with a comprehensive and modular wealth and insurance orchestration platform, delivered as cloud agnostic SaaS services.

Our Mission

To bridge the gap between traditional insurance and wealth management systems and modern digital ecosystems, enabling efficiency, personalisation, and trust at scale.

A complete wealth management suite

Every moonshot is also an odyssey, a journey into new territory guided by knowledge, discipline, and a clear destination.

Odycey Functions

- Dashboard: user specific dashboards for advisors, portfolio managers, and executives, customised to the way each person works.
- Party & Client 360: a complete client view, built as the primary source or connected to an existing CRM.
- Profiling & Compliance: brings together KYC, AML, assets, and liabilities to build a complete picture of each customer.
- Suitability & Assessments: a self service toolset for managing customer knowledge, experience, risk profiles, and representative rights.
- Portfolio Management: manages all asset types, supports model portfolios and rebalancing, and offers simulations for clients and advisors.
- Trading: supports exchange trading across configurable instruments and asset classes.
- Reporting: standard, self serve, and AI powered reporting, built to fit each client and advisor.
- Customer & Advisory: support for complete self- service and advisory workflow, from onboarding, contracting, trading, portfolio mgt., journals analytics and reporting

What Differentiates Odycey?

- **Modular by design:** use the full suite, or select only the modules relevant to your business.
- **Configurable everywhere:** instruments, asset classes, and exchanges adapt to your needs.
- **Built in compliance:** suitability, KYC, and regulatory reporting run alongside daily operations.
- **Flexible deployment:** multi-tenant or single-tenant, to match how you operate
- **Self service tools:** advisors and clients manage data, documents, and reporting without added complexity.
- **AI powered insight:** reporting, recommendations, and learning content that adapt to each client.

Common Functions

Play & Learn · Notifications · Risk Management · Documents · Financial Planning · Communication · Market Data · Wealth Connect · KYC/AML · Analytics · Trading · Party management

Portfolio & Investment Management

- **Instruments supported: all** fund types, equities, and derivatives, fixed income with enhanced functionality, accrued interest and risk assessment, and AIF cash flow support.
- **Built for:** discretionary mandates, private banking, family offices, accounting offices, and fund managers, with self service access for end customers.