

Case Study



Interactive Brokers

Brokerage Group Expands and Enhances Portfolio Management Software With AllData® Aggregation



Founded in 1978, Interactive Brokers has grown to become one of the premier securities firms with more than \$8.5 billion in equity capital and operating in more than 135 markets worldwide. Headquartered in Greenwich, Connecticut, and with more than 1,850 employees worldwide, Interactive Brokers and its affiliates execute more than 1.746 million trades per day.

Thanks to Fiserv technology, we can provide people with a powerful tool that lets them view all their financial accounts in one place. In addition to seeing their full financial picture, they can easily monitor performance, spot investment opportunities and create reports. We believe our PortfolioAnalyst tool has attracted new clients and helped us surpass the one million account milestone this year.

Steve Sanders

EVP of Marketing and Product Development
Interactive Brokers

We looked at data aggregation competitors, and, time after time, we stuck with AllData Aggregation and Fiserv.

Kristen Havner
Project Manager
Interactive Brokers

Seamless, Agile Service

Challenge

Interactive Brokers wanted to help clients centralize their accounts – even those held

