



Adaptability

Opportunity

Flexibility

Unitrax[®] AG Agility Generation

Transformation Program

Ingenuity

Resiliency

Creativity



Introduction

In an ultra-competitive landscape, it is necessary to challenge norms and drive enhanced value for your clients continually. It is from that perspective that LTIMindtree Canada began its multi-year journey transforming both business and technology architecture, creating the new Unitrax AG® platform. The focus of this digital transformation strategy has been to improve customer experience through screen rationalization, streamlined screen-flows, improved efficiency to accelerate processing times, along with new supportive features. These are based on a web-optimized platform that enables enhanced automation and integration access through RESTful APIs.

Business opportunity

As the leading Transfer Agency platform in the Canadian wealth management space, we continually have our eye on the future. Unitrax AG® serves as the cornerstone of our digital transformation strategy. It allows us to design the highest quality user experience for clients, investors, and staff. The platform is designed to increase efficiency, augment automation, enhance business performance and agility, improve scalability, and componentization to continue building for the future.

LTIMindtree Canada's Solution

Leveraging an agile delivery methodology, dedicated teams continually deliver enhanced module-based functionality through incremental agile deployments aligned with the core Unitrax® release schedule. Delivering Unitrax AG® in incremental deployments allows our users to explore the improved Unitrax AG® proactively. They can gradually align internal operational processes with the new interface and explore integration capabilities through standard APIs. Users can also distribute the UAT testing efforts across multiple releases, reducing testing bottlenecks and resource constraints.

Our solution takes a technology-first approach and provides exponential benefits, including:

- **Improved Experience and Usability:** Optimized screen flows, intuitive processing with dynamic steppers and wizard, and enhanced automation
- **Large set of REST APIs:** Integration and support for a holistic wealth ecosystem empowering real-time data-driven insights and digitization of client onboarding
- **Enhanced technology stack adopting Angular (web-native technology):** Ease of change, flexibility/scalability, improved performance
- **Integration with AI tools, Canvas Insight:** Optimized regression testing at a maximum depth

Why – Unitrax AG®



Measurable Results

Comprehensive engineering undertaking with a focus on customer experience, automation, quality, and security by design

500+

APIs

20+

Automation Tools

55%+

effort savings across IM CM OM



Experience

+25 years in the Canadian Wealth Management space

\$1+ Trillion Assets Under Administration



Client Focus

170+ clients across Investment and Insurance Wealth

Conclusion

We continue this transformation journey with our clients to build for the future. We invite you to learn more about how you can transform your back-office experience with the new Unitrax AG®.

For more information, visit our website at <https://www.ltimindtree.com/canada/products/unitrax-ag/> or get in touch with us at info.canada@ltimindtree.com

Headquartered in Mississauga, Ontario, LTIMindtree Financial Services Technologies Inc. ("LTIMindtree Canada") is a wholly owned subsidiary of Larsen & Toubro Infotech, a leading global technology consulting and digital solutions company.

With over two decades of rich experience, LTIMindtree Canada with its flagship product – Unitrax® – a SaaS-based transfer agency record-keeping suite, is one of the leading wealth and asset management platform in Canada, with Assets Under Administration in excess of CAD \$1Tril+, enabling fund manufacturers and insurance providers to address their record-keeping needs across the product spectrum such as Mutual Funds, GICs, Hedge Funds, Alternative Investments, Institutional Funds and Insurance Wealth Products – all under one platform.

LTIMindtree Canada has a deep understanding of disruptive technologies, and partners with top Canadian financial services firms to accelerate digital journeys of its clients through end-to-end consulting and implementation solutions, Smart Automation and Advanced Data Analytics, Cloud Infra & Security, Assurance Services and Business Process Management. Follow us [@LTI_Canada](https://twitter.com/LTI_Canada)