

Unlocking Amova Asset Management's digital capabilities

*How **CodeHQ** transformed
their NZ presence.*





Introduction

Amova Asset Management New Zealand Limited (formerly Nikko AM), offers KiwiSaver schemes, retail investment funds and institutional portfolio management. They provide tailored investment solutions supported by thorough research and market analysis, catering to both individual and large clients to help achieve their financial goals. Emphasising innovation, Amova continuously seeks advanced technological solutions to streamline workflows and enhance user experience.

Opportunities

Amova sought to create a unique and meaningful experience for their retail clients through digital platforms and to more effectively support their broad range of investment services. This included a robust user-facing portal for investment planning and sophisticated data management tools for accurate and efficient reporting. With the GoalsGetter platform, Amova aimed to improve investors' and advisers' online experience. With Data Tools, the company aimed to optimise data collection and processing, maintain compliance and provide the best possible service to their clients.

Approach

We collaborated seamlessly with Amova by adopting an integrated and agile approach, working side-by-side in the Amova office to define requirements, design the experience and prepare for implementation.

Key to this approach was:

- **Agile Methodology:** utilising Scrum methodologies, we conducted regular sprint planning, daily stand-ups and retrospectives to ensure consistent progress and quality.
- **Flexible Development Team:** we provided a flexible development and testing team based in Vietnam, led by one of our New Zealand Agile Project Leads, ensuring fluid collaboration and alignment with Amova NZ's goals.
- **Continuous Delivery:** we implemented continuous delivery practices to facilitate regular and reliable production deployments, minimising downtime and enhancing user experience.

Solutions Implemented

CodeHQ was engaged by Amova to address these challenges across the following key projects:

GoalsGetter Platform

We worked closely with the team of investment experts at Amova to design, extend and modernise the GoalsGetter platform, a consumer-facing portal and mobile app focused on helping users manage their investment funds and their KiwiSaver funds invested in the GoalsGetter KiwiSaver Scheme.

The platform helps users to set, track and achieve their financial goals, view and analyse their investment performance and make informed decisions about their investments.

Technologies Used:

- **Frontend:** Vue.js
- **Mobile:** PWA
- **Backend:** .Net
- **Cloud Services:** AWS
- **CRM Integration:** HubSpot
- **Data Integration:** MMC/APEX

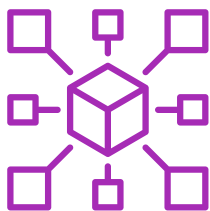
Data Tools

CodeHQ and Amova developed sophisticated data tools for collecting and refining data on performance, holdings and assets across Amova's funds and client portfolios. These tools are essential to Amova's team for generating Fact Sheets, Client Reports and regulatory reporting for the Financial Markets Authority (FMA), Companies Office, and corporate fund clients.

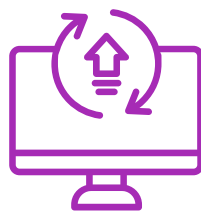
Technologies Used:

- **Frontend:** Vue.js
- **Backend:** .Net
- **Cloud Services:** Microsoft Azure
- **Data Integration:** MMC/APEX, enriched from commercial data subscriptions.

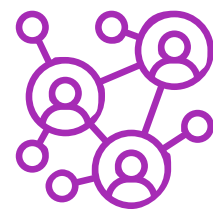
Results Achieved. Let's touch on a number.



Developed state-of-the-art tools in investment and portfolio data



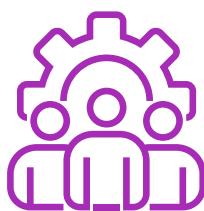
40% reduction in reporting estimated monthly and quarterly



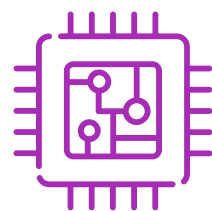
Higher conversion rates and NPS scores



Improved accuracy in client reports



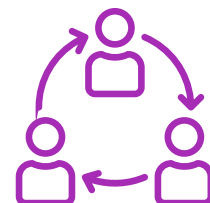
Increased reliability in regulatory submissions



Faster data processing



High levels of automated functionality for advisers representing over 30% of total investment



Increased reliability in enhanced user engagement via an intuitive and informative platform submissions

A few words from Amova

James Rogers, Chief Operating Officer at Amova NZ, highlighted our successful collaboration:

“Our collaboration with CodeHQ has been instrumental in the development and implementation of robust digital platforms to support the growth of our business. CodeHQ’s consistency in delivery, expertise and commitment to excellence have made them a critical partner in our digital transformation journey.”

Conclusion

Through our strategic partnership, Amova has successfully designed and implemented both B2C and adviser investment planning portal and a state-of-the-art investment, and portfolio data management tool. Enabling Amova to increase efficiency, develop new distribution channels and meet its strategic business objectives.

With our expertise and commitment to excellence we have been pivotal in driving this digital transformation, showcasing the impact of advanced technology solutions in achieving business success.

