

How Oscillas Enables Their Client's Portfolio With Mutual Fund Data from Barchart

OSCILLAS

Oscillas is a team of software engineers whose mission is to help businesses leverage data to drive actionable insights and process automation. Using data both in and out of the realm of the financial industry, Oscillas has been able to help companies automate investment research, craft new methods of analysis, and develop strategic advantages over their competitors.

THE PROBLEM

In 2017, The Oscillas team was approached by a company that enables wealth advisors to take a data-first approach to their client's retirement planning about creating a richer set of portfolio risk and return metrics. In order to accomplish this, they needed to supplement their existing datasets with mutual fund data in a very specific format in a timely, automated, and reliable manner.

THE SOLUTION

Oscillas is often on the frontline of data procurement and integration for their clients, and as a result, they have been around the block when it comes to financial data vendors. In looking for new data, they evaluate vendors on several factors – accuracy, reliability, and support.

"In most cases, all that's necessary to assess these factors is a look at a vendor's system documentation. If they've taken the time to thoroughly, intuitively, and thoughtfully document their data and the processes for accessing it, we can be confident that this level of care also applies to support teams, system reliability, and data accuracy," said CJ Black, CEO of Oscillas.

"With Barchart, we were immediately impressed with the level of attention given to the articles and instructions for using their data. A trial period of our desired data only served to improve our level of confidence and since then, Barchart has been by far the easiest vendor that we've ever worked with," added Black.

Oscillas was able to ingest and process Barchart's mutual fund data in incredibly short order, and since that initial integration they have been able to reliably pull information across the domestic mutual fund space without a single issue or worry. "As a result, we were able to enable our client's portfolio risk and performance calculations ahead of schedule and on-time ever since," said Black.

Oscillas looks forward to assisting their existing and future clients with the integration of, and migrations to Barchart's data in the future. To learn more about Oscillas, please visit www.oscillas.com.

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