



Press release
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Generali Wealth Solutions and Generali Luxembourg have chosen Atlantic Financial Group's Platon digital platform to monitor structured products

Generali Wealth Solutions and Generali Luxembourg have selected the solution developed by the Atlantic Financial Group teams in order to equip themselves with a digital platform covering the entire value chain of their origination, management and distribution activities for structured products.

Designed by Atlantic Financial Group, the Platon platform is a truly connected dashboard that provides an instant overview of structured product portfolios to facilitate the management of commercial, market and regulatory risks.

The use of the platform will thus enable Generali Wealth Solutions and Generali Luxembourg to better support their partners in monitoring the issued products. In this way, the two entities' teams will be able to view all the important information relating to the various means of support: performance of the structured product since the launch, distance of the underlying from the coupon and protection barriers, summary of coupons already distributed, availability of marketing and legal documents. In addition, it will be possible to program alerts on the occurrence of events during the life of the products or to generate automated real time reports (diversification of exposure to issuer credit risk, underlyings, maturities) and to simulate market shocks in order to study their impact on the portfolios.

Platon will eventually boost the product offering to partners by automating the process of requesting quotes from bank issuers and will help to automate a number of time-consuming tasks currently performed by different support and back-office functions.

"We studied the various platforms developed by the players in the product ecosystem at length and were won over by Atlantic Financial Group's comprehensive, agile and robust solution, which met our specifications. By choosing Atlantic Financial Group, we will free up commercial time and improve the quality of service we offer to our partners and their customers. Throughout the tender process, we greatly appreciated the expertise, reliability and responsiveness of Atlantic Financial Group's teams, who were able to build a tool adapted to our needs", commented **Alessandra Gaudio, President of Generali Wealth Solutions.**

Paul Lecoublet, General Manager of Generali Luxembourg, added: *"In the context of a strong increase in the number of structured products referenced in our contracts, it was necessary to have an ergonomic and innovative digital solution that would allow us to better manage our risks on this asset class. The platform will also allow us to better forecast future prepayments on our products in order to better serve our partners. In addition, this new solution will allow us to better anticipate their needs by developing new tailor-made structured products.*



Julien Duniague, Managing Partner of Atlantic Financial Group and Laurent Sasson, Head of Markets France, Atlantic Capital Partners: *"We are delighted to be able to work with Generali Wealth Solutions and Generali Luxembourg and to conclude this agreement with a major institutional player in the structured products market. From the outset of our discussions with the Generali team, we have been able to observe their great professionalism and we are convinced that their working methods combined with our digital solution position them ideally for the foreseeable future. This partnership validates the technological lead of our digital platform, which is a strategic part of our global offer and increases our presence on the French market.*

About Generali Wealth Solutions

Created in 2020, Generali Wealth Solutions is an AMF-approved management company and a wholly-owned subsidiary of Generali Vie. Its mission is to offer support, expert assistance, training and solutions in two areas: asset engineering and financial engineering.

Generali Wealth Solutions offers Managed Services solutions invested in UCITS, accessible and turnkey, and Dedicated Management solutions, composed of direct securities and UCITS in open architecture, with access to the financial manager. It also offers expertise in the origination of structured products.

About Generali Luxembourg

Founded in 2011, Generali Luxembourg is an insurance company dedicated to high net worth individuals (HNWI / UHNWI). The company distributes its life and capitalisation products through a network of private banks, family offices and CGP, mainly in Europe through the freedom to provide services (LPS).

About Atlantic Financial Group

Atlantic Financial Group is a European financial services provider offering tailor-made services to institutional investors, financial professionals and large private clients. Atlantic Financial Group employs 48 people in various locations across Europe, including Paris via the advisory firm Atlantic Capital Partners. Within the group, strong expertise in structured products has been developed, including the design of a digital product monitoring platform.

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