

CORE CAPITAL MARKETS PRACTICE

Platform Implementation & Migration

Enterprise delivery for trading, investment, risk, operations, finance, and regulatory platforms - from selection and design through migration, cutover, and stabilization.

CORE SIGNAL

A platform program succeeds only when the target technology, operating model, data, controls, and transition plan become executable together.



THE MANDATE

Why This Practice Matters

Capital-markets platform change is rarely a software installation. It is a controlled transfer of business capability across products, desks, workflows, data models, interfaces, controls, and people.

EXECUTIVE QUESTIONS

- 1 Which capabilities should move, remain, retire, or be redesigned before the platform is configured?
- 2 Can every critical trade, position, client, and reference-data flow be traced across the target ecosystem?
- 3 What evidence will prove that migration, controls, and operational readiness are complete?
- 4 How will the institution cut over without losing service, control, or the ability to recover?

WHO WE SUPPORT

Investment banks and broker-dealers

Asset managers and hedge funds

Market infrastructure providers

Wealth and custody organizations

FinTech and platform vendors

CORE CAPITAL MARKETS

ENTERPRISE ADVISORY

THE CAPABILITY MAP

Six Capabilities That Define the Practice

A structured view of the business, technology, data, control, and operating-model capabilities required to execute reliably.



01 Platform Strategy

Translate business ambition into a platform roadmap, target capability model, and investment sequence.

02 Solution & Integration Design

Define application boundaries, interface contracts, workflow orchestration, and non-functional requirements.

03 Data Migration

Profile, cleanse, map, transform, reconcile, and evidence the movement of positions, trades, clients, and history.

04 Testing & Acceptance

Coordinate functional, integration, performance, control, regression, and user-acceptance testing.

05 Cutover & Readiness

Plan rehearsals, migration windows, go/no-go criteria, operational readiness, and rollback paths.

06 Stabilization & Adoption

Control the hypercare period, resolve defects, transfer ownership, and prove value realization.

THE PROBLEM LANDSCAPE

Where Institutions Lose Control

The recurring failure patterns that create operational risk, delivery friction, hidden cost, and weakened executive confidence.



01 Scope Without Boundaries

Programs begin with a product name rather than an explicit capability, data, and operating-model scope.

02 Interface Blind Spots

Downstream dependencies emerge late because inventories and interface contracts are incomplete.

03 Weak Data Evidence

Converted records look plausible but lack lineage, reconciliation, exception ownership, and sign-off.

04 Testing Too Narrow

Happy-path functional tests overlook volumes, controls, timing, recovery, and operational exceptions.

05 Cutover by Calendar

A date drives the migration even when readiness criteria, support coverage, and rollback are immature.

06 Adoption Afterthought

New workflows are delivered without ownership, training, metrics, or retirement of old behavior.

MDMI DIAGNOSTIC LENS

We test whether the program can execute a safe transfer of capability - not merely whether the target platform can be configured.

THE ADVISORY OFFER

What MD Market Insights Delivers

Modular services that can be deployed independently or combined into a sequenced transformation program.



01

Platform Selection & Fit Assessment

Evaluate functional fit, architecture, integration, data, control, commercial, and delivery implications.

02

Current-State & Target-State Design

Map capabilities, processes, applications, interfaces, data ownership, and control responsibilities.

03

Requirements & Backlog Leadership

Produce decision-grade requirements, user stories, acceptance criteria, and traceability.

04

Migration & Reconciliation Design

Create source-to-target mappings, conversion rules, controls, reconciliations, and sign-off packs.

05

Testing, Cutover & Readiness

Define test strategy, cutover command structure, readiness gates, rehearsals, and contingency plans.

06

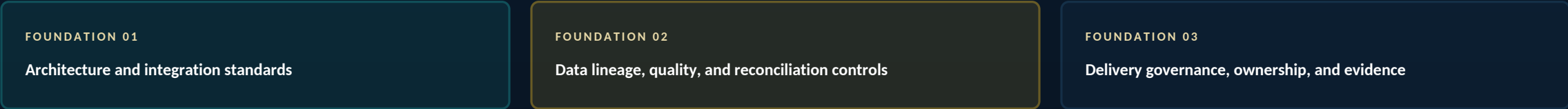
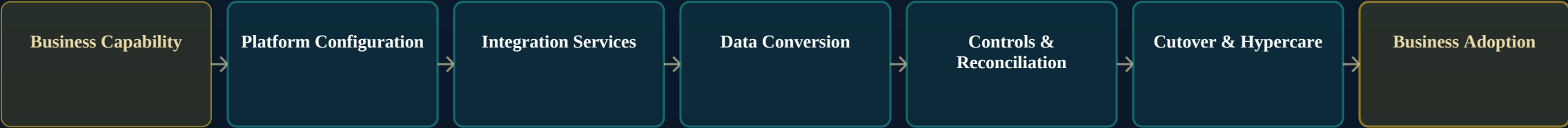
Program Recovery & Assurance

Diagnose delivery risk, re-baseline scope, close evidence gaps, and restore executive control.

THE SYSTEM VIEW

From Strategy to Controlled Execution

The practice is designed as an end-to-end system: decisions, workflows, platforms, data, controls, and outcomes must operate as one chain.

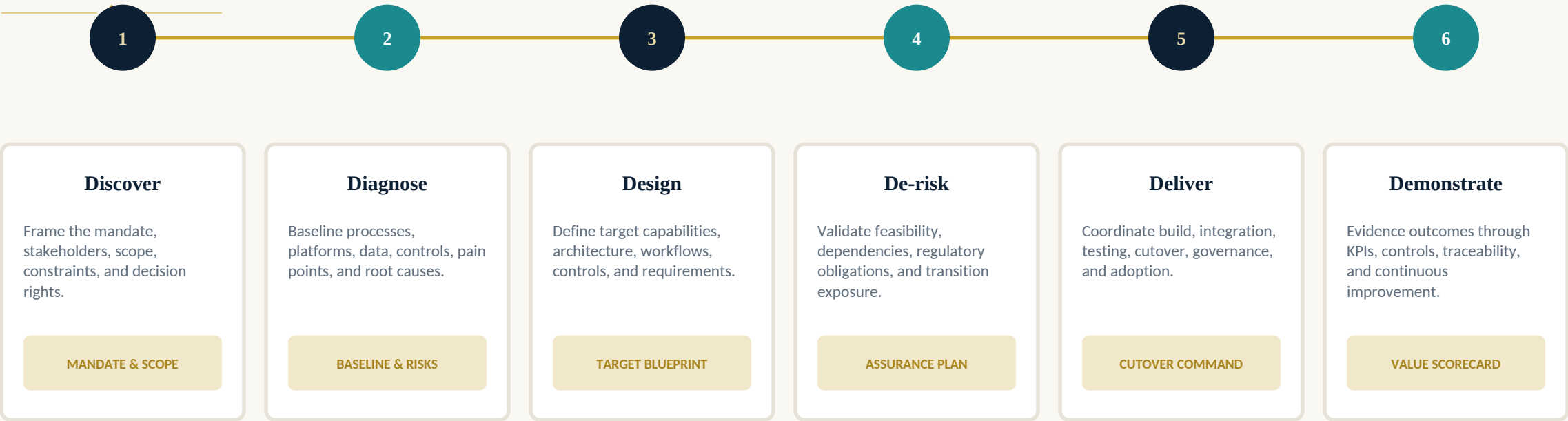


Governance · Controls · Traceability · Ownership · Evidence

THE MDMI METHOD

A Six-Phase Path from Ambition to Adoption

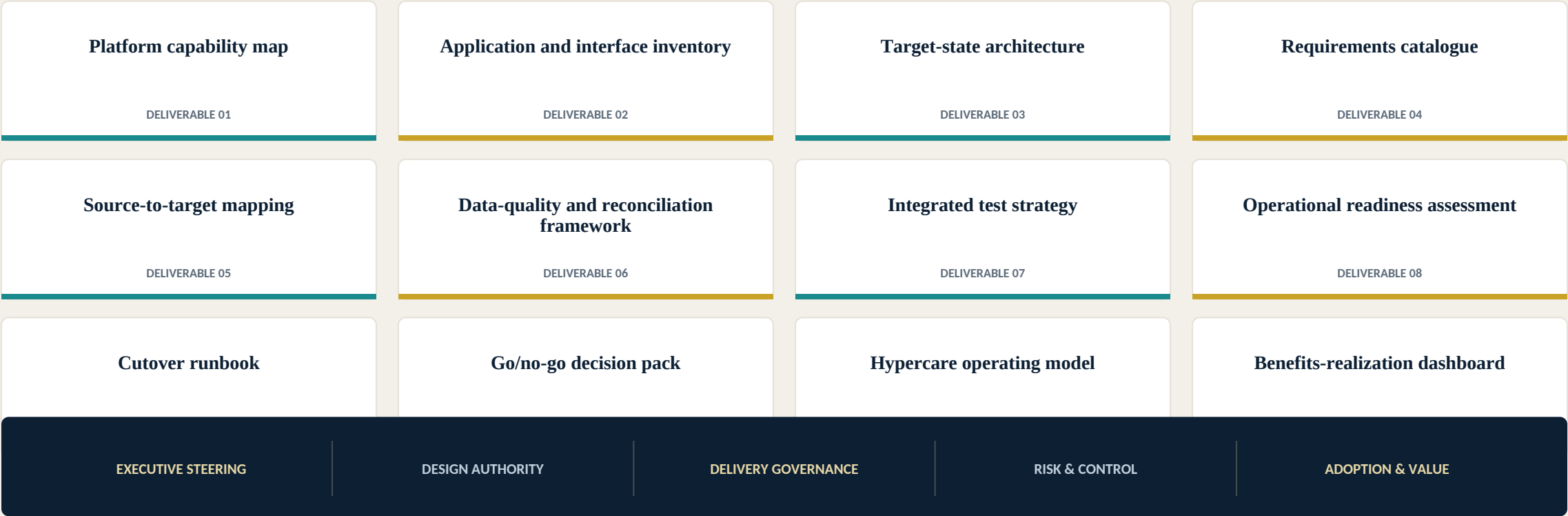
A disciplined method that converts executive intent into implementable decisions, tested capabilities, operational readiness, and measurable value.



THE WORK PRODUCT

Decision-Grade Artifacts, Not Shelfware

Every artifact is designed to drive a decision, control execution, transfer knowledge, or evidence an outcome.



THE VALUE CASE

Representative Use Cases and Success Measures

Illustrative applications showing how the practice converts complex institutional problems into controlled, measurable



01

OMS/EMS Replacement

Migrate order and execution workflows while preserving routing, allocation, compliance, and intraday resilience.

02

Investment Platform Consolidation

Unify portfolio, accounting, risk, and operations capabilities across multiple legacy estates.

03

Risk Engine Modernization

Replace calculation infrastructure while reconciling sensitivities, limits, scenarios, and downstream reporting.

04

Post-Trade Utility Migration

Transition confirmation, clearing, settlement, and reporting flows with strict control and cutover evidence.



BUILD THE NEXT MOVE

Turn Complex Change into Controlled Execution.

MD Market Insights provides the business, systems, data, control, and delivery discipline required to move an institution from platform ambition to a stable operating reality.

OPTION 01

Diagnostic Sprint

Rapid baseline, critical risks, priority decisions, and a sequenced action plan.

OPTION 02

Advisory Workstream

Focused design or delivery support for a defined capability, platform, or control domain.

OPTION 03

Transformation Partner

End-to-end support from strategy and architecture through implementation and adoption.

