



On-prem Data



Snowflake Migration

Transforming Data Management and Migrating to Snowflake at an Asset Management Firm

WHO WE ARE



UB Technology Innovations leverages Microsoft Fabric to craft dynamic and user-friendly solution. Our Fabric expertise empowers you to build modern interfaces, streamline development, and achieve superior performance.



THE CLIENT

The client is a prominent asset management firm managing over \$200 billion, specializing in deep value and credit-intensive strategies. They serve a diverse clientele, including institutional and individual investors.



CHALLENGES

The firm faced several critical challenges with its existing data infrastructure, which included a mix of on-premises SQL Server and fragmented data management systems:

- **Scalability Issues:** The existing SQL Server and data warehouse struggled to handle the increasing volume and variety of data.
- **Performance Bottlenecks:** Slow query response times and performance slowdowns delayed data analysis and reporting, making it difficult to support timely investment decisions.
- **Data Silos:** Disconnected data across various departments resulted in fragmented insights and hindered effective integration for a unified view of the firm's financial landscape.
- **High Operational and Maintenance Costs:** The high costs of maintaining on-premises infrastructure strained the firm's IT budget and limited resources for strategic innovation.
- **Limited Advanced Analytics:** The legacy systems lacked the advanced analytics capabilities necessary for complex financial modeling, forecasting, and data-driven decision-making.

WHAT WE DO

- Streamlined data management process
- Third Party System Integration
- Intuitive user interface
- Interactive customized reports
- AI Capabilities



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SOLUTION

To address these challenges, the firm chose to migrate to Snowflake, leveraging its cloud-native platform for scalability, performance, and integrated analytics. The implementation followed a clear, structured approach:

1. **Assessment and Planning:** A detailed evaluation of the firm's infrastructure was conducted, followed by the development of a comprehensive migration strategy, including data transfer, schema conversion, and tool integration.
2. **Data Migration:** The firm migrated its data from SQL Server and other siloed systems to Snowflake, utilizing ETL tools and Snowflake's data loading capabilities.
3. **Data Validation and Testing:** After migration, thorough testing ensured data integrity, with performance validation confirming significant improvements in query speeds.
4. **Cloud-Native Architecture & Integration:** Snowflake's cloud-native architecture provided the flexibility to scale resources dynamically. Integration with existing analytics tools and business applications ensured seamless transition and optimization.
5. **User Training and Adoption:** The firm provided training to data analysts and other stakeholders to familiarize them with Snowflake's features, ensuring smooth adoption and maximizing the platform's capabilities.
6. **Go-Live and Continuous Optimization:** Post-migration, the firm switched to Snowflake as its primary data platform. Continuous monitoring and performance optimization ensured ongoing operational efficiency and cost-effectiveness.



SOLUTION BENEFITS

The migration to Snowflake delivered significant improvements across various aspects of the firm's operations:

- **Scalability and Performance:** Snowflake's elastic scaling capabilities allowed the firm to efficiently handle large volumes of data and run complex queries faster, with query performance improving by over 60%.
- **Cost Efficiency:** Operational and maintenance costs dropped by 40%, thanks to the elimination of on-premises infrastructure and lower ongoing maintenance costs.
- **Enhanced Advanced Analytics:** Snowflake's integration with data science and machine learning tools enabled the firm to conduct advanced analytics, improve forecasting, and make more data-driven investment decisions.
- **Unified Data Platform:** By combining structured and semi-structured data, Snowflake enabled the integration of various data sources. Secure data sharing and collaboration across departments improved decision-making and reporting capabilities.
- **Optimized Data Accessibility:** Faster and more reliable access to data enhanced the accuracy and timeliness of investment strategies, improving competitive advantage in the market.



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CONCLUSION

The migration to Snowflake transformed the firm's data infrastructure, streamlining data management and boosting analytics capabilities. With improved scalability, performance, and cost efficiency, Snowflake helped the asset management firm achieve a unified, flexible data platform that drove better investment decisions and fostered more effective collaboration across departments.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with more than 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics and Healthcare. We are the preferred Microsoft Gold Certified partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



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