

A Comparison Tool for Collateral and Margin Management

It's time to rethink collateral and margin management. What are the options?

	SPREADSHEET	SOFTWARE PACKAGE	OUTSOURCED	CLOUD BASED
PEOPLE	Internal resource, requires proficiency in Excel to achieve sophistication	Internal IT, Operations, Collateral Management, Risk Management teams heavily involved	Outsourced team but requires internal resources to validate work	Internal collateral management team (platform users) only
IMPLEMENTATION	Immediate	Several months to years, multi-year commitment	Lengthy contract negotiations to cover services and risks	Simple contract, can go "Live in Five" days for standard set up
MAINTENANCE	Self help	Complex testing and ongoing deployment of fixes and upgrades	Not visible to customers	Technical, operational and functional upgrades and maintenance are all handled by provider
CUSTOMISATION	Limited by Excel skills	Highly customizable; complexity and cost can increase	Driven by contractual relationship; the more specialised, the more cost	Free integrations with "best of breed" platform partners and industry infrastructure
COST	Free - but needs people and Excel	High - license, installation, upgrades, testing	High - people and service fees	Low - annual fee based on number of active agreements, and small on-boarding cost
SUMMARY	Low cost but prone to error and lacks automation; therefore holds the highest risk	High functionality but expensive, lengthy implementation, ongoing maintenance, hosted in-house	High cost, benefits of outsourcing still requires internal team to validate work	High functionality at low cost with constant upgrades and regulation readiness

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