

Establish direct to consumer distribution with our end-to-end digital fund platform

Offer your customers direct investment solutions, allowing you to grow the relationship with your unitholders and scale your business. Huddlestock offers brandable front-end experiences and regulatory compliant infrastructure to automate fund trading, payment flows, safekeeping and reporting.

Onboarding

Integrate pre-built digital investment experiences in your own brand with KYC/AML validation

Create your own custom experience and user journey with our straightforward API



Fund trading

Fully digital and automated order execution and routing

Full support for tax wrappers including ISK accounts



Safekeeping

Custody management and shareholder register

Integrate with any fund administrator or transfer agency



Reporting

Digital regulatory and tax reporting

Create customer reports and access investor analytics

Why Huddlestock?

- *Leverage cloud technology* – Implement modern, highly scalable infrastructure that will future-proof your business
- *Tap into our API* – Expand your services and connect to the third parties you rely on
- *Count on our expertise* – we'll work alongside your business to ensure your success

Visit huddlestock.com

Contact us at info@huddlestock.com

NOWO.

Fund Management AB



huddlestock

Nowo scales direct fund distribution to 100k+

The company

Nowo is a Swedish savings platform that offers unique ways for individuals to build wealth and plan for the future. Customer savings are automatically invested in Nowo's Global Fund, and the company also offers free personalised pension advice and savings tips.

The challenge

Nowo developed its app to assist consumers with their long-term savings goals and to facilitate direct distribution of its fund. As Nowo's customer base expanded, there arose a need to integrate a scalable back-end system capable of automating the fund investment process.

Rutger Selin, CEO at Nowo Fund Management, explained, "When we first launched our savings app, we engaged two solution providers to manage the back-end investment operations. However, the growth of Nowo necessitated a more scalable solution capable of managing a larger volume of customers and transactions."

To select the right provider for its business, Nowo shortlisted 10 potential vendors both in Sweden and overseas. The Nowo team aimed to grasp how the chosen solution would function in practice to ensure effectiveness, compliance, and cost efficiency.

The solution

Nowo selected the investment management system from Huddlestock due to its end-to-end solution offering flexibility in several areas:

- **Fund order management:** Huddlestock's platform provides a comprehensive solution for customer management, order processing, and reporting, enabling Nowo to automate processes with a single platform.
- **Swedish market support** – By adopting a localised platform, Nowo gained full functionality off the shelf, implementing multiple ISK accounts for customers and handling local tax reporting and data management effortlessly.
- **Integration** – Huddlestock's API facilitated seamless integration with Nowo's front-end application as well as its preferred third-party payment service provider and custody bank.

The Result

Since integrating Huddlestock's platform, Nowo has been able to focus on growing its business and now has over 100,000 savings customers with direct investments in its fund.

"With Huddlestock's platform streamlining the complete investment process, we have more time to focus on our customers and fund management. We now have a scalable system in place that will future-proof our operations as we progress," stated Selin.

Nowo can directly access investor information and analytics through Huddlestock's platform, enabling a deeper understanding of their customer base to inform decision-making.

"Since implementing Huddlestock's platform, their team has consistently provided excellent system support for any queries we've had. We plan to make further enhancements to our savings app moving forward, and Huddlestock's API and support team will be invaluable for this purpose."



Rutger Selin
CEO at Nowo Fund Management

Selin remarked, "Working with Huddlestock's implementation team made the process of switching platforms and migrating information completely painless. Through this process, we successfully transitioned from two providers to one and changed our depository bank, resulting in a highly cost-effective solution."

