

# SoHo Capital brings Vestmark's advisor technology to APAC

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Private investment firm SoHo Capital has signed a letter of intent to bring Vestmark, a portfolio management and trading software provider, to the Asia Pacific region, *Asian Private Banker* can reveal.

The collaboration will initially be focused on the regional deployment of advisor technologies surrounding separately managed accounts (SMAs) and unified managed accounts (UMAs) and will leverage SoHo Capital's [Strategy Data Exchange \(SDX\)](#) — a B2B platform for investment managers and distributors.



*Frank Troise, SoHo Capital*

“This is the first and largest data model library of institutional portfolio strategies in APAC,” said Frank Troise, founder and chairman of SDX. “Asia’s massive investor base represents an extraordinary opportunity for us to leverage our existing technology to lower costs and provide higher returns for the end investor.”

The two firms have begun beta tests for technology deployment with “a core group of regional asset managers and sponsors” in Singapore and, afterwards, will continue to roll out the broader technology suite and platform to its global userbase.

“We are excited about exploring with SoHo the opportunity for a regional expansion in Asia, with Singapore as a beachhead,” said Rob Klapprodt, president of Vestmark. “The sheer economic size of the opportunity is enormous, and we look forward to the impact our technology will have in the region for the wealth management industry, independent financial advisors, and the institutional investment community.”

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SDX has a library of over 2,100 manager strategies that are shared within an ecosystem that spans Asia and Europe and comprises 52 private banks, nine banking platforms, and 34 family offices and IAMs.

[In September, SoHo began its collaboration with Oracle to scale up SDX's data.](#) Similarly, the collaboration was set to start with a roll out in Asia.

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