



Press Release

New Access signs an agreement with Mercado de Valores de Costa Rica for its Front-Office solutions: EQUALIZER® III and e-Banking platform

San José, Costa Rica, November 23rd 2017

New Access, leading provider of Front-to-Back software solution dedicated to the private banking and wealth management industries, has signed with Mercado de Valores de Costa Rica a partnership for its Front-Office solutions including the Portfolio and Order Management System: EQUALIZER® III as well as the e-Banking platform.

Mercado de Valores de Costa Rica is a specialized private financial group, which since 1976 provides advice and brokerage, with high standards of service.

Mercado de Valores de Costa Rica has chosen to trust New Access for its ability to provide a comprehensive Front-Office solution. The company decided to implement New Access' Portfolio Management System (PMS) EQUALIZER® III to analyse their client's portfolios and help them implement the most appropriate investment strategy while providing high quality reporting to customers.

"We needed to have a strong analytical and transactional (Order Management) Portfolio Management System, this is the backbone of our business. New Access brings with them the knowledge of the industry to help us implement a totally agile and scalable tool putting us again in a leading position in the Costa Rican market and giving us better confidence to start international expansion," says Eddy Arguedas Chief Operations Officer at Mercado de Valores.

Besides this, Mercado de Valores will be using New Access' e-Banking platform, which will be accessible to their clients through internet browsers or mobile applications.

"New Access will support us in our Digital Transformation as our objective is to provide our clients with an enhanced user experience. New Access makes this possible thanks to their highly innovative and user friendly e-Banking interface" complements Eddy Arguedas.

"This agreement opens the door of Costa Rica making this partnership the shop window of a combined effort with a key player in the market," says Jean-Michel Guillot Head of Business Development Latin America at New Access.

About New Access

New Access provides agile and scalable Front-to-Back software solutions dedicated to meet the specific requirements of the private banking and wealth management industries evolving in a complex and changing regulatory environment; helping bankers to connect conveniently and efficiently with their clients thanks to new digital channels. Our offer covers the full client relationship lifecycle from account opening, through client data and document management to the management of their portfolios including: Onboarding and Client Relationship Management (CRM) with **BRANCH®**, secure Electronic Document Management (EDMS) with **LOGICAL ACCESS®**, Portfolio and Order Management (PMS/OMS) with **EQUALIZER® III**, **e-Banking**, Client Data Management with **CIM** and a comprehensive Core Banking solution with **APSYS**. New Access' Front-End solution **BANKER's FRONT** integrates in one 360° view all information linked to the client including: onboarding process, documents, portfolio and client data.

With headquarters in Switzerland, New Access has offices in Brazil and Panama in Latin America and has already installed its solutions in over 180 sites in 20 countries.

About Mercado de Valores de Costa Rica

Mercado De Valores reach its clients through two companies: Mercado de Valores de Costa Rica Puesto de Bolsa S.A. and Multifondos SFI. Investment Funds Society. Mercado de Valores Puesto de Bolsa S.A. entered into operations in 1976 year of the creation of the National Stock Exchange (BNV), of which they are a founding member. Multifondos SFI S.A. was established 20 years later. Both companies were formally registered as Grupo Financiero in January 2001.

As part of their structure they have consolidated a department specialized in the analysis and monitoring of international economic trends, which allows them to take an active part in the negotiation of fixed income, variable and structured products of the main exchanges in the world.

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