WealthArc

CASE STUDY | M&P

Meisser & Paganini AM × WealthArc:
Simplifying portfolio management while increasing control

Adrian Sergi
Partner at MPAM

The Client

Meisser & Paganini Asset Management (MPAM) is a Swiss discretionary asset manager founded in 1999. The firm serves a client base across Switzerland and Europe and manages portfolios across several investment styles including a mix of private markets investments.

The team's day-to-day focus is delivering high-quality discretionary portfolio management for its clients.

The Context

For many years, MPAM worked with the same portfolio management system. Over time, the environment around it changed, as regulatory requirements became more dynamic, reporting expectations increased, and portfolio oversight demanded greater flexibility.

When MPAM learned that its existing system would be discontinued, the firm took the opportunity to step back and reassess its technology foundation, as a considered upgrade aligned with how the business operates today.

pressure factors

- evolving regulation
- rising reporting expectations
- legacy system discontinued

need for a new technology foundation

The Objective

MPAM approached the transition with a clear set of priorities. The goal was not to add complexity, but to simplify daily work while strengthening control.

In practice, the team was looking for a platform that could:

- Reduce manual preparation without weakening oversight
- Support trading workflows with built-in validation against strategy constraints
- Provide clearer portfolio insight, including risk and aggregated views
- Offer reporting that adapts to different client preferences
- Remain reliable and accessible beyond standard office hours
- Ensure a strong regulatory back-bone

The Solution

After reviewing several providers, MPAM selected WealthArc as its new Portfolio Management System. The decision was guided by a set of practical requirements shaped by how the firm operates day to day.

Compliance-ready foundation
Compliance was a non-negotiable requirement. MPAM needed confidence that the system would remain aligned with evolving regulatory requirements, rather than requiring constant adjustments or workarounds.

Daily efficiency without losing control
Operational efficiency was equally important, but only when paired with oversight. In particular, the firm wanted trading workflows that verify planned trades against strategy constraints directly in the system, instead of relying on manual checks across multiple tools.

Analytics that match client expectations
As investor expectations continue to rise, MPAM needed the flexibility to provide detailed metrics and risk analytics when required, without forcing the same level of complexity on every client.

Working with multiple custodian banks, MPAM also needed confidence that portfolio data could be consolidated and presented consistently across accounts, ensuring clarity and reliability across reporting and oversight.

> "Having a consolidated and consistent view across custodian banks gives us much better oversight than we had before, both for reporting and for day-to-day decision-making."
>
> **Adrian Sergi,** Partner at MPAM

Usability

Finally, usability and structure played a decisive role. Many alternatives felt either overly modular, introducing complexity over time, or broader than MPAM required. WealthArc stood out as a modern platform with a clear product structure and transparent pricing. Once data was available in the system, it proved intuitive to use and well suited to real daily portfolio management work.

Implementation

The onboarding process began in early November 2025, with MPAM going live with initial custodian data in December 2025. As with many multi-custodian onboarding projects, full rollout depends partly on custodian timelines and connectivity, so MPAM is bringing additional banks live step-by-step while running parallel processes for security and continuity.

Nov 2025	Dec 2025	Early 2026
onboarding starts	first data live	gradual custodian rollout, hands-on support

Receiving live data within a few weeks, latest by end of the same year was an important milestone and allowed the team to begin working with the platform while the broader migration continues.

MPAM also highlighted the responsiveness and hands-on support of the onboarding team of WealthArc throughout the transition. The close collaboration and fast turnaround created a strong sense of confidence early on, with the feeling that the WealthArc team was fully engaged, working alongside them day and night to ensure a smooth rollout.

This level of availability and direct engagement helped build confidence early in the transition, reinforcing that the partnership extended beyond the technical implementation itself.

> “During the transition, it often felt like the WealthArc team was working day and night alongside us. The level of responsiveness and engagement gave us real confidence early on.”
>
> **Adrian Sergi,** Partner at MPAM

Early Results

Within a few weeks, MPAM has experienced tangible changes in daily workflows already.

Previously, portfolio preparation often involved pulling data into Excel, building custom lists, filtering portfolios manually, and cross-checking decisions against client requirements. Last but not least, more complex workflows, particularly across larger client groups, could take close to an hour.

With WealthArc, much of that manual preparation is no longer required. Work that once involved several separate steps is now handled directly in the platform, allowing teams to move through portfolio preparation and validation more efficiently and with fewer interruptions.

> "What matters most for us is practicality. WealthArc gives us a system where compliance is built in, workflows are faster without losing control, and reporting adapts to the client, not the other way around."
>
> **Adrian Sergi,** Partner at MPAM

Key metrics are visible immediately on the dashboard. Rather than searching across tools, important figures are available at a glance, supporting a more consistent rhythm in daily decision-making.

before	after
Excel-heavy workflows	in-platform workflows
~1 hour preparation	significantly reduced time
manual validation	automated checks
scattered data	unified dashboard overview

Client Communication & Trust

Reporting flexibility has been another meaningful improvement. MPAM can tailor reports based on client preference, keeping views simple for clients who want only the essentials, while providing deeper analytics and risk metrics for more sophisticated investors.

Crucially, reports mirror custodian data. This consistency reinforces trust in client conversations while offering more clarity and structure than standard bank reporting.

Partnership Perspective

MPAM views the relationship with WealthArc as a long-term partnership. Beyond the technology itself, the collaboration has been characterised by direct access, responsiveness, and close engagement.

> "Spending time on site with MPAM, seeing how their teams operate and how clients move in and out of the office, reinforces what this work is really about. We're not just implementing software, we're supporting a business that has been built over decades. Every technology provider should spend time with clients in their own environment to truly understand the responsibility that comes with being part of that infrastructure."

Dennis Hagander
Director of Sales

As MPAM continues its rollout and looks ahead, WealthArc provides a stable, flexible foundation to support regulatory confidence, operational efficiency, and future growth.

About WealthArc

WealthArc is a global data infrastructure company delivering high-quality, AI-ready portfolio data at scale to wealth and asset management.

WealthArc Data Box

WealthArc Data Box is a next-generation global data feed grid that connects you to your most important custodians and data sources, automatically aggregating your investment data, cleaning, reconciling, and validating it through an advanced API framework to ensure the highest quality. The result is trusted data delivered seamlessly to your AI systems and any wealth-tech or fintech applications, giving you access to reliable portfolio data worldwide and empowering you to make wiser, faster, and better decisions.

WealthArc PMS

WealthArc PMS is an intuitive portfolio management application that enables wealth managers, asset managers, and family offices to manage their wealth, reduce costs, and streamline all processes — from front to back office — within one centralized, cloud-native, and user-friendly platform.

www.wealtharc.com

Get in touch with our Team!

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