

Octogone × WealthArc:

Building a trusted data backbone for scalable, AI-ready wealth management



Ivan Peruffo
CEO of Octogone



The Client

Octogone is an international external asset manager operating across Geneva, Bahamas, Miami, Panama, and Dubai, serving clients through more than 50 custodian relationships across the group. Operating at this scale created complexity in data flows, reporting, compliance, and client servicing – particularly where data formats and quality varied by custodian and jurisdiction.

The Challenge

With data arriving from dozens of banks in different formats and levels of quality, Octogone's teams faced daily inefficiencies. Relationship Managers had to log in to multiple portals to access client portfolios, while executives lacked a single view across entities. Compliance and leadership needed faster, more reliable oversight of new accounts and group-wide activity.



multiple jurisdictions

complex data flows



inconsistent
formats & quality



no unified
view



fragmented
reporting



compliance
slowdowns



The Opportunity

To turn this multi-custodian complexity into an advantage by building trusted, structured, and connected data that provides a solid foundation for current operations and prepares the business for future AI-driven applications.

The Solution



“Very few solutions in the market genuinely connect to US and global custodians at the scale we need. WealthArc’s breadth of custodian coverage lets us consolidate clients across entities and serve them seamlessly worldwide.”

Ivan Peruffo, CEO of Octogone

WealthArc delivered a unified data backbone for Octogone’s international operations, coupling global custodian connectivity with an automated reconciliation engine to guarantee actionable and trusted data quality – the foundation for operational efficiency and client excellence, but also for future AI-readiness across the group.

Global custodian connectivity

Broad US and international integrations enable true portfolio consolidation across entities and banks.

RM dashboard

A single-page view of balances, positions, and performance that RMs can rely on daily.

Executive oversight & exports

Leadership views by custodian, entity, RM, assets, accounts with the ability to export everything for analysis.

Built-in compliance

OFAC/PEP checks via an integrated policy link support daily screening across offices.

Data-quality partnership

WealthArc worked hard to tune feeds and reconcile data so teams of Octogone could rely on one source of truth.



The Outcomes: Speed, trust, and client excellence at scale

Octogone's advisors now work from one clear portfolio view instead of multiple bank portals, responding faster and more consistently to clients. Executives can review new accounts in Panama or Dubai from Geneva, retrieve files and KYC instantly, and export what is needed without manual rework. With a reconciled data backbone and expanding custodian connectivity, Octogone has the operational foundation to continue to scale internationally with confidence.

“Data quality is the key. WealthArc leaned in with us to keep custodian data feeds accurate, so now we treat it as our single source of truth. From Geneva I can review new accounts opened in Panama or Dubai, pull up files and KYC quickly, and export what leadership needs – we’ve traded portal-hopping for speed and confidence.”

Ivan Peruffo, CEO of Octogone



Why WealthArc



Global connectivity at pace

150+ custodian new-generation data feeds through WealthArc Data Box, delivering broad coverage across Europe, North America, Monaco, Bahamas, and more.



Future-ready data architecture

Designed to ensure data consistency, interoperability, and readiness for AI applications and advanced analytics across global teams.



Intuitive portfolio management

WealthArc 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.

About WealthArc

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



Simon Kaufmann
Managing Director of WealthArc

“ We are proud to have Octogone as one of our clients, as they are exactly the type of organization that benefits most from our global reach and best-in-class datafeeds. ”



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!

contact@wealtharc.com