

External Communication



Research Enabling Solutions

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ANALEC ClientManager™ goes live at Yuanta Securities

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Yuanta Securities, Taiwan's leading securities broker, successfully implemented ANALEC's ClientManager™ software platform to raise its client servicing effectiveness in the market place.



ClientManager™ is an enterprise level business intelligence and client servicing platform geared to the specific requirements of the investment banking and stock brokerage businesses. It brings together vital aspects of the client servicing function, by integrating sales, trading, research, and

back office functions onto one seamless electronic platform in order to raise the effectiveness of services delivered by brokerages and investment banks to their clients. In addition to raising service effectiveness and aiding proactive decision-making within the brokerage/bank, ClientManager™ delivers an intelligent means of tracking revenue flows from customers (versus budgets and plans), while enhancing the customer (service) profitability analysis within the brokerage/bank.

Speaking on the occasion of the successful launch of ANALEC ClientManager™ at Yuanta Securities in Taiwan, ANALEC's CEO – Indy Sarker – enthusiastically stated, "Our ClientManager™ suite goes a significant distance to facilitate business at a brokerage/bank, as it delivers a lot more than mere contact management. It delivers significant client servicing capabilities in ways that strongly appeal to the brokerage/investment banking industry, scoring over traditional 'one-size-fits-all' CRM solutions in the market place. At Yuanta, we have seamlessly integrated British Telecom's dealer-board telephony capability within our suite, in order to make the user experience efficient and without the tedium and duplication when it comes to reporting and logging activities. To provide value added inputs on client activity, we have integrated our system with our clients' regional trade settlement systems, in order to provide a window on the revenues delivered by clients, categorised on the basis of markets, stocks and products."

ClientManager™ unlike many of the on-demand CRM offerings in the market place is a *deployed solution* (i.e., physically installed within the brokerage/bank), delivering all the data confidentiality and data security comfort to its customer organisations. It manages highly sensitive information within the client organisation in ways that ensures discriminated access rights to individuals within the organisation, as well as meets all internal guidelines on controls. On connectivity options it allows for access via direct SQL; TCP remoting and/or web services; depending on the location and security requirements of the organisation for access both inside and while outside the office network.

Commenting from a technology perspective ANALEC's CTO – Colin Stone – "ClientManager™ is a windows application based product suite, delivering vastly superior response times to its users, over pure web-based on-demand CRM solutions. Given the fast paced nature of the sales & trading brokerage business, our clients require almost instant response to their actions on their system. We

ensure that is the case. Secondly, the platform caters to global businesses and deployment with built-in global replication capabilities across servers around the world, based on the specific configuration of servers and user base in each client organisation.”

ANALEC ClientManager™ also seamlessly integrates with MS Outlook and Lotus Notes, in order to once again reduce duplication of effort and administrative tedium. It aims to eliminate a number of manual and time consuming processes within the client servicing function, while introducing transparency and accountability within the brokerage/bank.

According to ANALEC, ClientManager™ continues to receive a warm reception in the market place which should translate to a growing customer list, after the successful launch at Yuanta.

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About ANALEC:

ANALEC is a specialised service provider to the investment banking and investment research industry. It leverages its deep domain knowledge of the investment research and investment banking industry to develop and deploy enterprise level software-enabled business process solutions, addressing very specific organisational issues and challenges within investment research and client servicing functions. Under its remote delivery model, ANALEC offers its customers the option to remotely manage and deliver a range of services. Founded in June 2003, ANALEC brings together over 50 years of leading expertise in investment research, investment banking and software development and deployment in the investment banking and capital markets domain. Headquartered out of Singapore, ANALEC has a delivery centre in India and a sales office in the United States.

Website: www.analec.com

About Yuanta Securities:

Yuanta Securities is the leading securities brokerage firm in Taiwan. Yuanta Securities offers a host of financial services, including traditional retail brokerage, research, investment banking, online trading, mutual funds, fixed income and derivative products.

Yuanta Securities is a wholly-owned subsidiary of Yuanta Financial Holdings. Yuanta Securities was first listed in 1995 but was de-listed in 2007 when it merged with Fuhwa Financial Holding Company and became its subsidiary. In September 2007, the company then merged with another subsidiary, Fuhwa Securities. The parent company was simultaneously renamed Yuanta Financial Holdings.

Through its strategic alliance with Kim Eng Holdings, Yuanta Securities has an Asia regional presence. In addition to its operations in Taiwan, it has offices in Singapore, Hong Kong, Thailand, Manila, Jakarta and sales offices in London and New York.

Website: <http://english.yuanta.com.tw/index2.asp>

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