



seccl

Pioneering technology and digital services for the wealth management industry

# SaaS & Outsourcing



## SaaS



### Seccl Core

Trading, settlement, custody



### Seccl Pfolio

Portfolio analysis, models, product management



### Professional Portal

Manage client portfolios



### Illustrations

Visual representation of projected product performance



### Florence

Artificial Intelligence backed chatbot



### Investor Portal

Intuitive dashboard for the investor

## Outsourcing



### Digital Custody

Outsourced asset custody covering Funds, Equities & ETFs



### Digital Products

Outsourced GIA, ISA & SIPP management

# API First



- API-first strategy, built to integrate
- Part of best-of-breed technology stack
- Industry standard RESTful interface
- Facilitates speed to market of new users
- Reduces significantly operational costs

# Example: Speed to market



Four API “calls” to place assets

Create  
Client

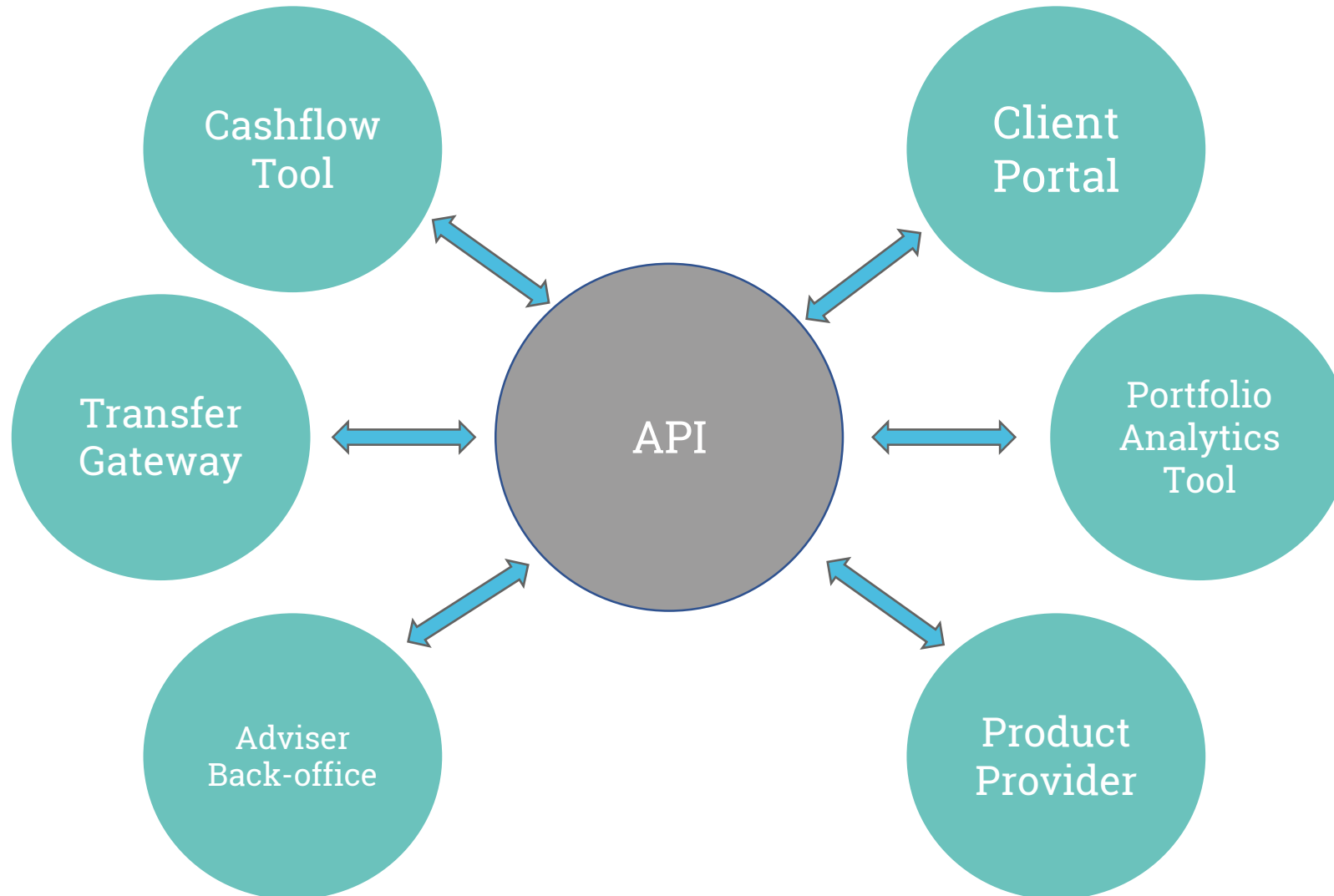
Create  
Wrapper

Place Cash &  
Orders


View  
Portfolio

Process developed in days, delivered in seconds

# Example: Operational Efficiencies



# Developer Friendly



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Q Search

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## Introduction

Welcome to the Seccl API! You can use our REST API to access the Digital Custody service. This will allow client and account management, creating payments and orders, viewing portfolio details and listing available instruments.

**i** Need help with our API? Want to share ideas? Or just want to try things together? Our community in Slack is the place to be for this. You can [join here](#).

## API Response Format

Our API will return data in a specific format.

An API response will return an object with `data` and `error` properties.

A search response will return a slightly different object: `data` will be an `array`. There will also be an additional `meta` field. This will be useful for pagination etc.

### Response Data

This returns the following data

Field	Description
<code>data</code>	Returned data - will be an object or array (search only)
<code>meta</code>	Meta information including pagination for API search requests only
<code>error</code>	An error object as described in the <a href="#">errors</a> section

```
shell
API endpoint
https://pfolio-api-staging.seccl.tech

API response
{
  "data": "{} or []",
  "meta": {
    "count": 1000,
    "page": 1,
    "pageSize": 50
  },
  "error": {
    "errorMessage": "Error message",
    "type": "Error type",
    "fieldErrors": [
      {
        "fieldName": "Field name in error",
        "type": "fieldErrorType",
        "errorMessage": "Field error message"
      }
    ]
  }
}
```



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