



Transition Management Provides for Making Portfolio Changes to Asset Allocation

Agency-only Trade Execution and Dedicated Project Management

At CAPIS, we offer full-scale Transition Management for multi-asset and multi-vehicle events on risk management, project management, and trade execution. Our clients value and appreciate our commitment to superior execution, strong historic performance, focus on true transparency during the transition, and a clear focus on the risks inherent with each event.

What is CAPIS Transition Management?

CAPIS Transition Management (TM) provides project management and trade execution for clients making portfolio changes to their asset allocations.

Why use CAPIS Transition Management?

Agency brokerage:

No proprietary trading. Your interests are our priority. And, as an independent broker, we provide the anonymity needed to reduce information leakage and minimize market impact.

Proprietary analytics:

Our pre-trade evaluates the fundamentals of each trade, including potential risks and the estimated cost range of the event. During and after the event, we provide comprehensive and transparent reporting to validate the cost and execution strategy.

Customized execution strategies:

Each event and each client have unique requirements. Our model allows maximum flexibility in developing and implementing a trade strategy that reduces risk in an efficient manner.

Project management:

We provide a single point of contact and expertise throughout each event. Our approach reduces a client's workload and risk while providing comprehensive oversight.

Highlights

Reporting and Event
Transparency
Deep Market Expertise
Single-source, High-touch
oversight
Full Project Management

Integrity | Execution | Transparency