

Tableau Delivers Visual Analysis of Securities Trading Cost Data

Rosenblatt Securities Creates State of the Art Trading Cost Analysis and Reporting for its Customers

Customer Profile

Rosenblatt Securities is an agency-only execution boutique that represents customers in the listed and over-the-counter markets both through its trading desk and via direct access to the NYSE floor. The firm has a reputation for integrity and discretion, employing an approach that is free of conflicts-of-interest. Since 1979, the firm has helped its institutional customers lower transaction costs and increase the efficiency of their trading through providing tailored, leading-edge technology and trading solutions.

Customer Case Description

The Analytics Group at Rosenblatt Securities is responsible for collecting, analyzing and interpreting customer trading data. The group needed to quickly examine hundreds of thousands of trades, compare those trades to multiple client-specified benchmarks and proprietary measures, highlight outliers and areas for continuous improvement, and prepare a summary for download into intuitive, graphical reports for its clients.

The key challenge was to find an application that enabled iterative, visual analysis of thousands of data fields.

The group searched for an effective front-end application to perform data analysis and reporting. Compatibility with existing tools such as Microsoft Excel and MySQL was critical.

The primary evaluation criteria for the new application were: (1) it had to enable multidimensional data analysis, (2) it had to be easy to present crisp visualizations, (3) it had to be easy to learn and use, and (4) it had to be deployed quickly without servers or IT support.

The Solution

Rosenblatt Securities selected Tableau as its newest analysis application.

Tableau now enables the team to directly access data and gives it flexibility and unmatched visual analysis capabilities.

For More Information About This Case

Contact: visualanalysis@tableausoftware.com or call (206) 633-3400 x1

“The basic philosophy in our business is exceeding our customers’ expectations in all we do—whether it’s trading, analysis, or execution consulting. It is a pleasure to find like-minded solution providers because Tableau has certainly exceeded our expectations.”

Scott R. Burrill, CFA, Director
Rosenblatt Securities