



## CASE STUDY

# Investment Trust System for a Leading Japanese Bank



<https://luvina.net/>





# PROJECT OVERVIEW

LUVINA SOFTWARE





Luvina has been entrusted with the development and long-term maintenance of an investment trust system for a top-tier Japanese bank. The system had been running reliably for decades, and the client sought a partner capable of enhancing and expanding its functionality without compromising stability, performance, or security.

To meet these expectations, Luvina built a dedicated engineering team with strong financial domain expertise and Japanese language proficiency, while applying internationally recognized software development and quality management standards.

**Religion:** Japan

**Industry:** Banking & Finance

**Focus Area:** Investment Trust

**Duration:** Oct 2012 ~ present

**Team size:** 20-25 members/month (as of Jan 2025)

**Services:** System development & maintenance

**Key technologies:** VB6, Cobol, Pro\*C





# REQUIREMENTS & SOLUTIONS

## Client Requirements

- **Uncompromising quality standards:** Quality is the top priority; every update must pass rigorous checks and meet high expectations.
- **Strict adherence to schedule:** Timeliness is second only to quality.
- **Meticulous attention to detail:** Documentation, reports, and deliverables must be precise, clearly written, and end-user ready.
- **Continuous improvement:** The team must not only maintain current standards but proactively improve capabilities to keep pace with evolving business demands.

## Luvina's Solutions

- Implemented global standards: ISO 27001 (Information Security), CMMI Level 3 (Process Maturity).
- Formed a core team of Japanese-speaking engineers with deep financial domain knowledge.
- Customized a hybrid development process combining the client's standards with Luvina's offshore model continuously evolving with each project phase.

# ACHIEVEMENTS

## Up to 40% **cost savings**

By offshoring high-level technical work to Luvina, the client reduced dependency on costly domestic vendors.

## **On-time delivery** for 13 consecutive years

All milestones were met on schedule, even amidst changing requirements.

## 100% first-time **acceptance rate**

Every release met the client's strict quality expectations from the first delivery.

## **Long-term team stability**

13+ years of ongoing collaboration, with over 10 team members having more than 10 years of continuous involvement ensuring knowledge retention and operational consistency.



# FEATURES & USE CASES

# KEY FEATURES

Topic / Feature	Level of Expertise			
	Extensive	Intermediate	Small-scale experience	Knowledgeed
1. Financial & customer business management	Account opening	Investment fund and financial product management	Profit distribution / Reinvestment	
	Order processing (including domestic and international)	Reporting and data aggregation	Management of identified accounts / special customers	
	Periodic issuance	Tax and special invoice issuance	Information management and compliance control	
2. Internal operations & system administration	HR, department, and internal account management	Credit limit, credit information, and creditworthiness management	Exceptional case handling, data verification	Transactions between subsidiaries
			Overseas mail handling, public utility operations	
			Account consolidation, inheritance, account gifting/donation	
3. Technical processes & software development	Internal design	Current system survey	Test planning	
	Unit testing	External design		
	Feature development (coding)	Comprehensive/system testing	Release preparation, official deployment	
	Integration testing			
4. Deployment Capacity				
Largest project size ever handled		88 MM		
Number of topics handled simultaneously		5		



# Overall System Model

## 1. User Access Channels

- **Internet:** Remote access and online transactions.
- **Service Counters:** PC/Tablet devices for inquiries and transactions.
- **Call Center:** Customer inquiries and support via centralized system.
- **Back Office / Headquarters / Operations Center:** Business administration and transaction processing.

## 2. User System Center

Includes:

- Front-end systems (service counters, tablets, etc.)
- Call Center platform
- Fax-OCR integration module

Secure connection with client's central system via **B\*Net\*\***

## 3. Primary Data Center (Tokyo)

Main system **B\*JJ\*\*** composed of:

- **COMPASS:** Navigation subsystem
- **FOCUS:** Research subsystem
- Server clusters: front-end, backend, database, and external interface

Integration with external services: e-BANGO, e-AURORA, FundWeb and partnerships with external vendors: N, N-J\*&T...

## 4. Disaster Recovery Data Center (Osaka)

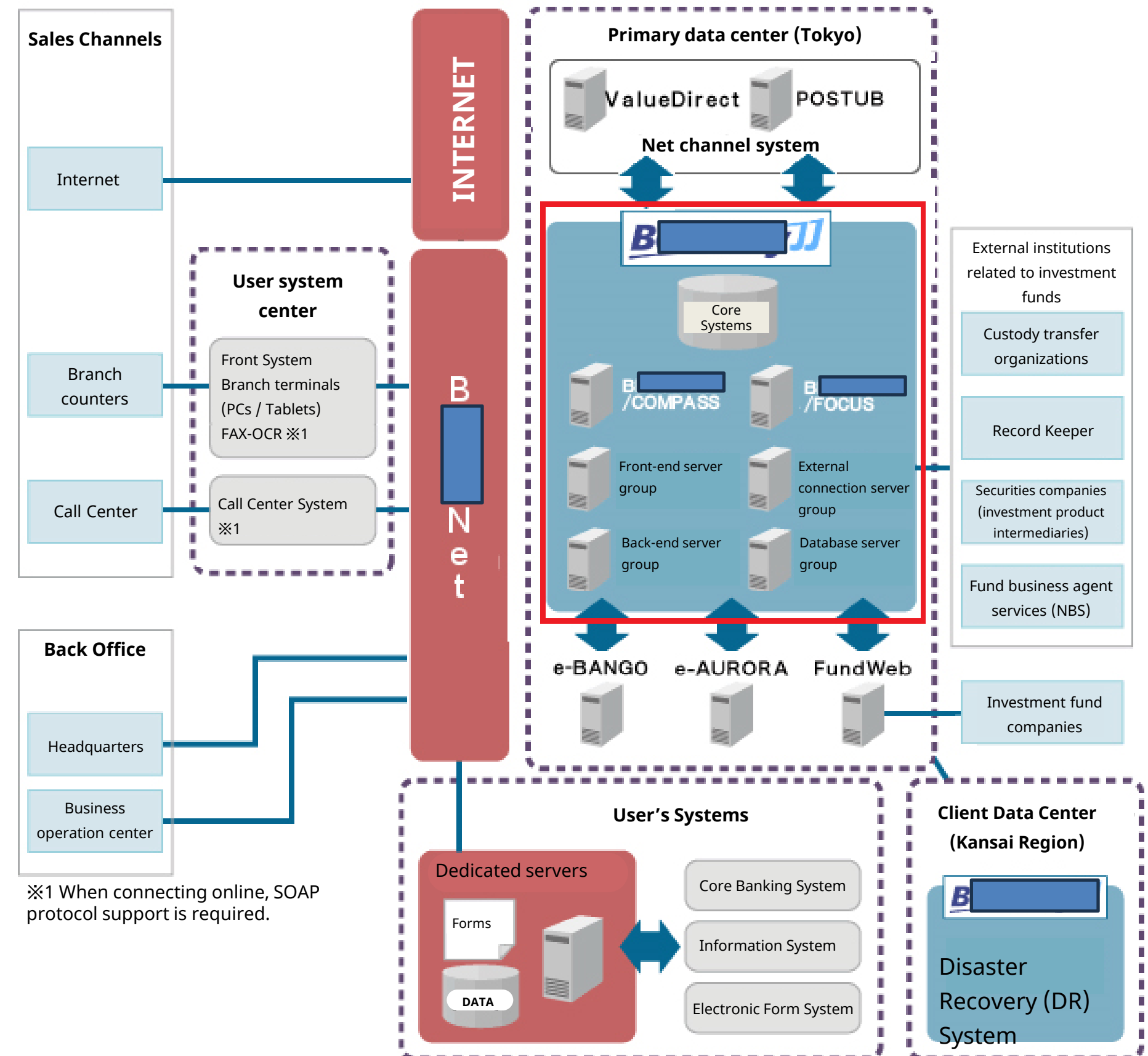
Dedicated **DR system** activated in case of failures at the Tokyo primary center.

## 5. Client-Specific Server Systems

Internal systems for billing, information management, electronic processes, and business administration.

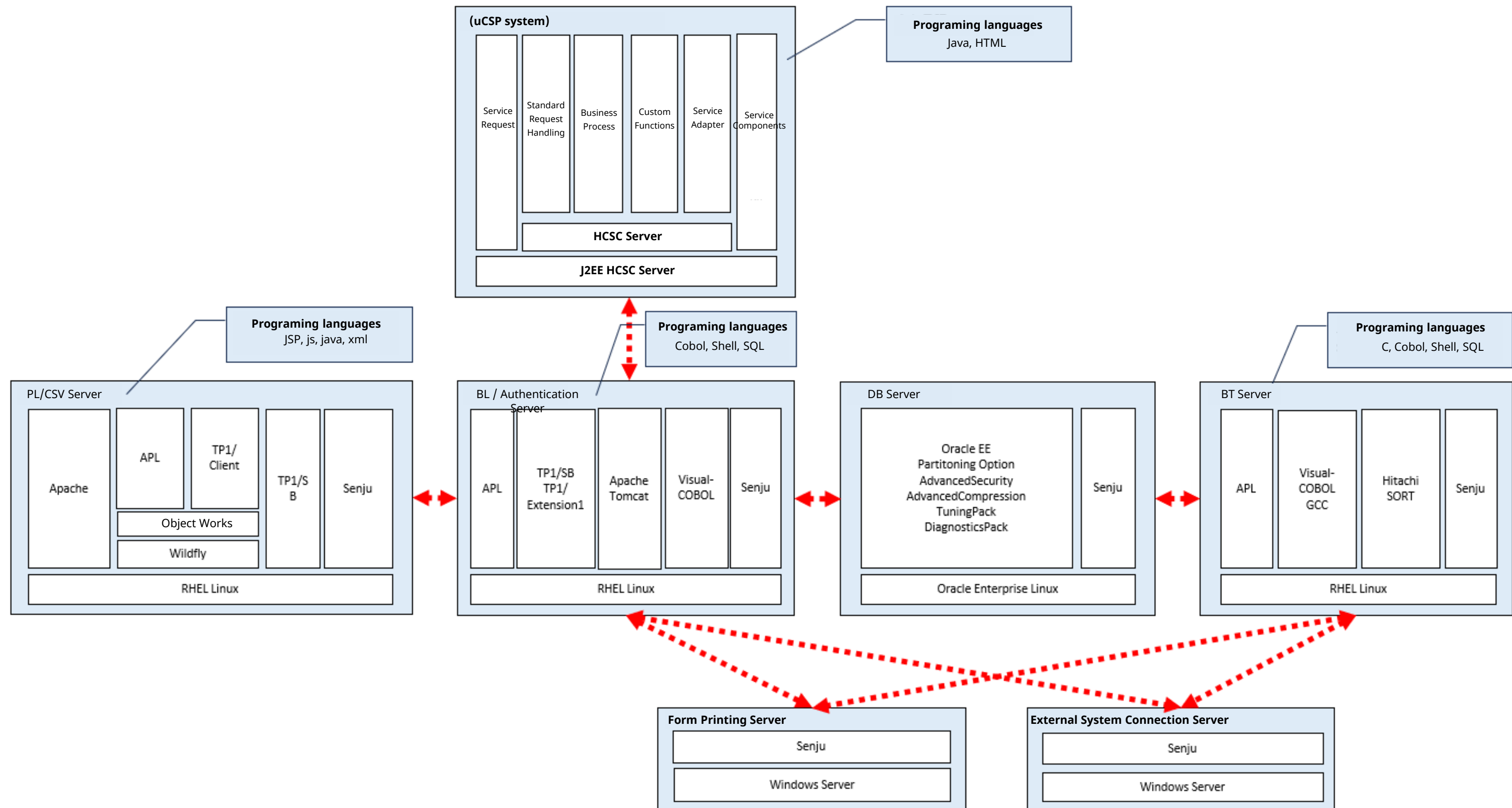
## 6. Concurrent connections

User → B\*\*\*Net → Tokyo → External Partners / DR System (Osaka)





# Overall System Model







# MILESTONES & RESOURCES





# Team Achievements and Project Progression

Year	2012	2013	2014	2015	2016	2017
Milestones		▲ Apr 2013: Official development started		▲ Nov 2015: Maintenance phase started		▲ Apr 2017: NBS development started
Key Activities	Preparation & Trial phase		Official project with de velopment requirements		Development & maintenance of LGP server	NBS pilot phase
Workload Ordered (MM)	35	148	152	191	165	260

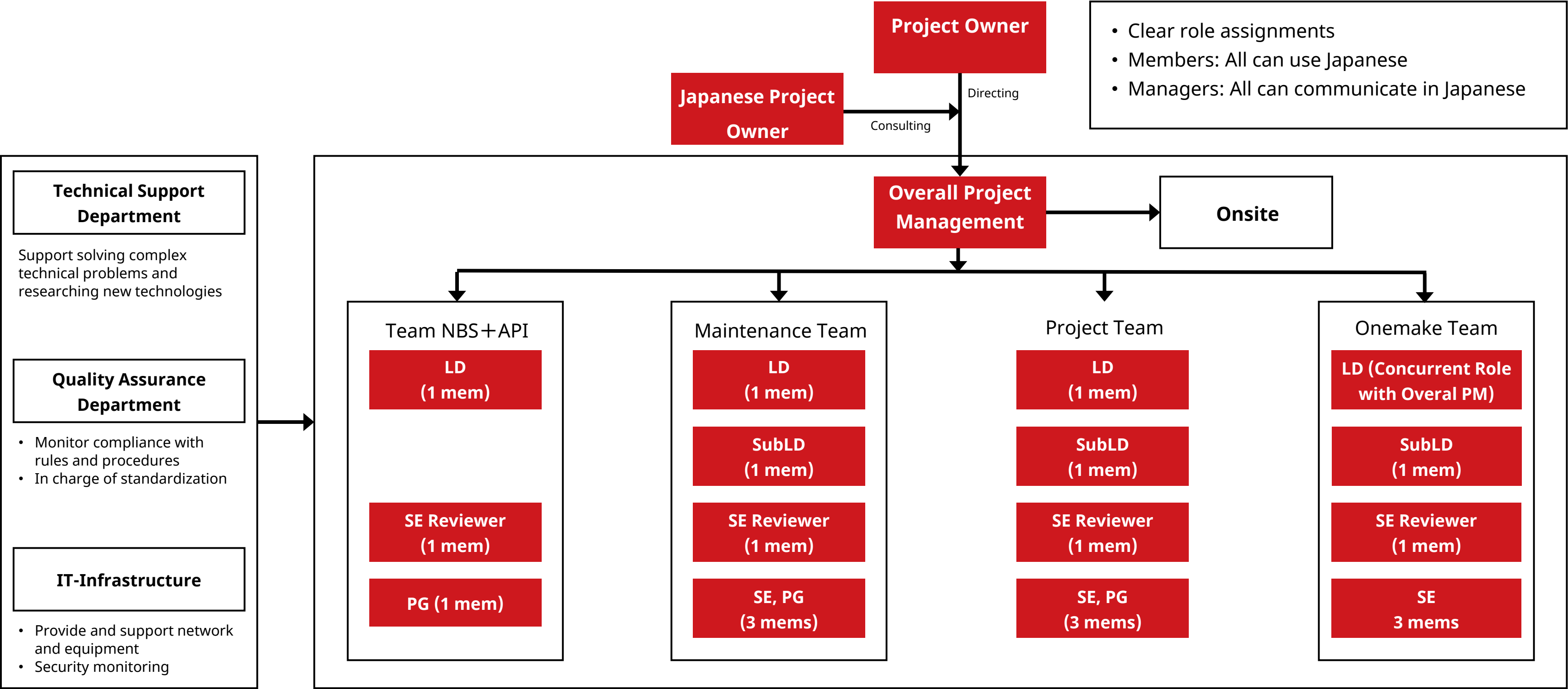


# Team Achievements and Project Progression

Year	2018	2019	2020	2021	2022	2023
Milestones		▲ May 2019: API development started		▲ Nov 2021: LFU server migrati on		
Key Activities	Onsite support, NBS maintenance	API research & preparation	New API development & maintenance	LFU server maintenance	On going support	
Workload Ordered (MM)	358	394	336	228	195	160



# Organizational Chart



# Thank You

## CONTACT US



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