



## CASE STUDY

# Investment Trust System for a Leading Japanese Bank



<https://luvina.net/>



# PROJECT OVERVIEW

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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.

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

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

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

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

## **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
<b>1. Financial &amp; customer business management</b>	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	
<b>2. Internal operations &amp; system administration</b>	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	
<b>3. Technical processes &amp; software development</b>	Internal design	Current system survey	Test planning	
	Unit testing	External design		
	Feature development (coding)	Comprehensive/system testing	Release preparation, official deployment	
	Integration testing			
<b>4. Deployment Capacity</b>				
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)

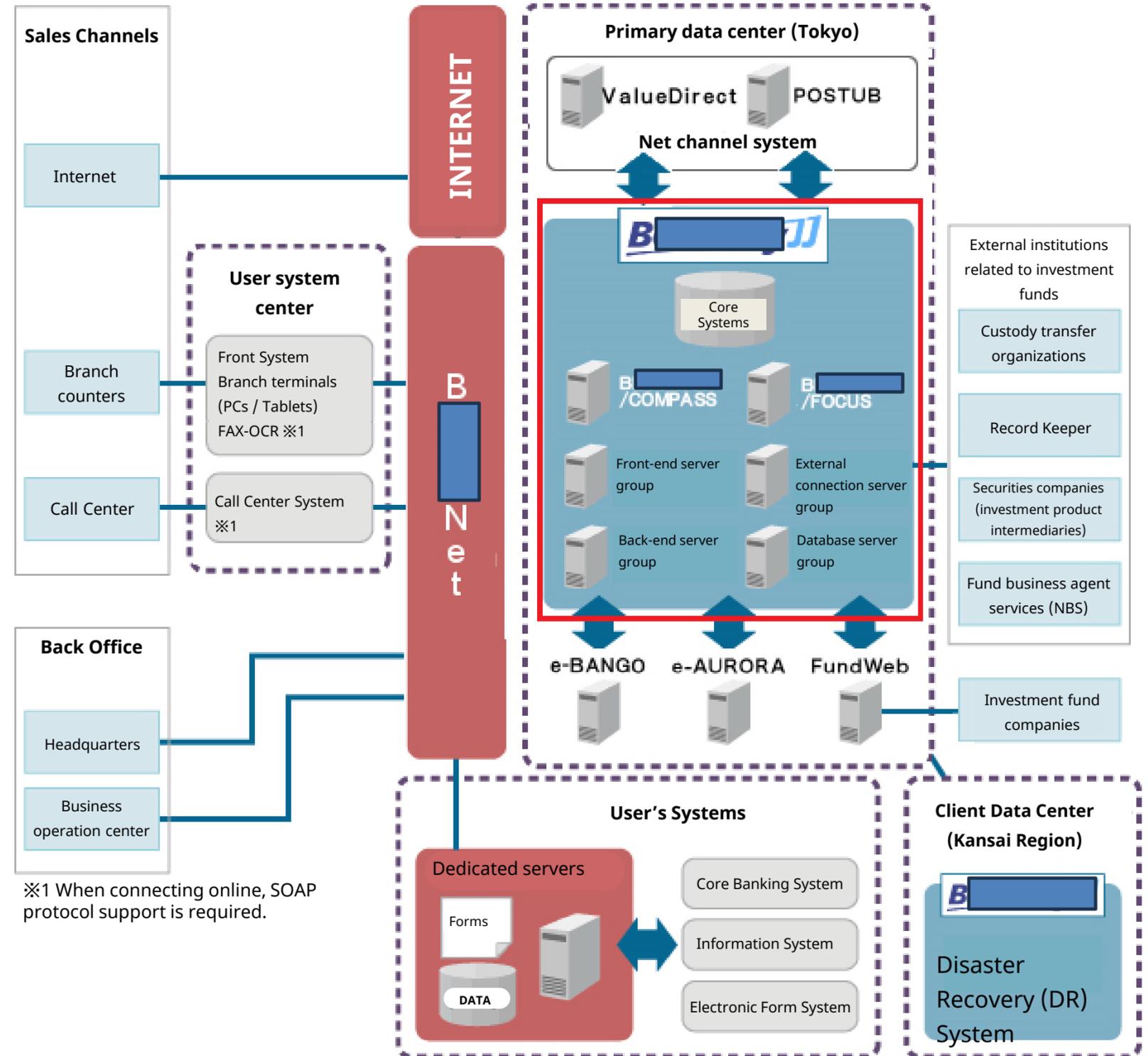
Dedicated **DR system** activated in case of failures at the Tokyo primary center.

## 5. Client-Specific Server Systems

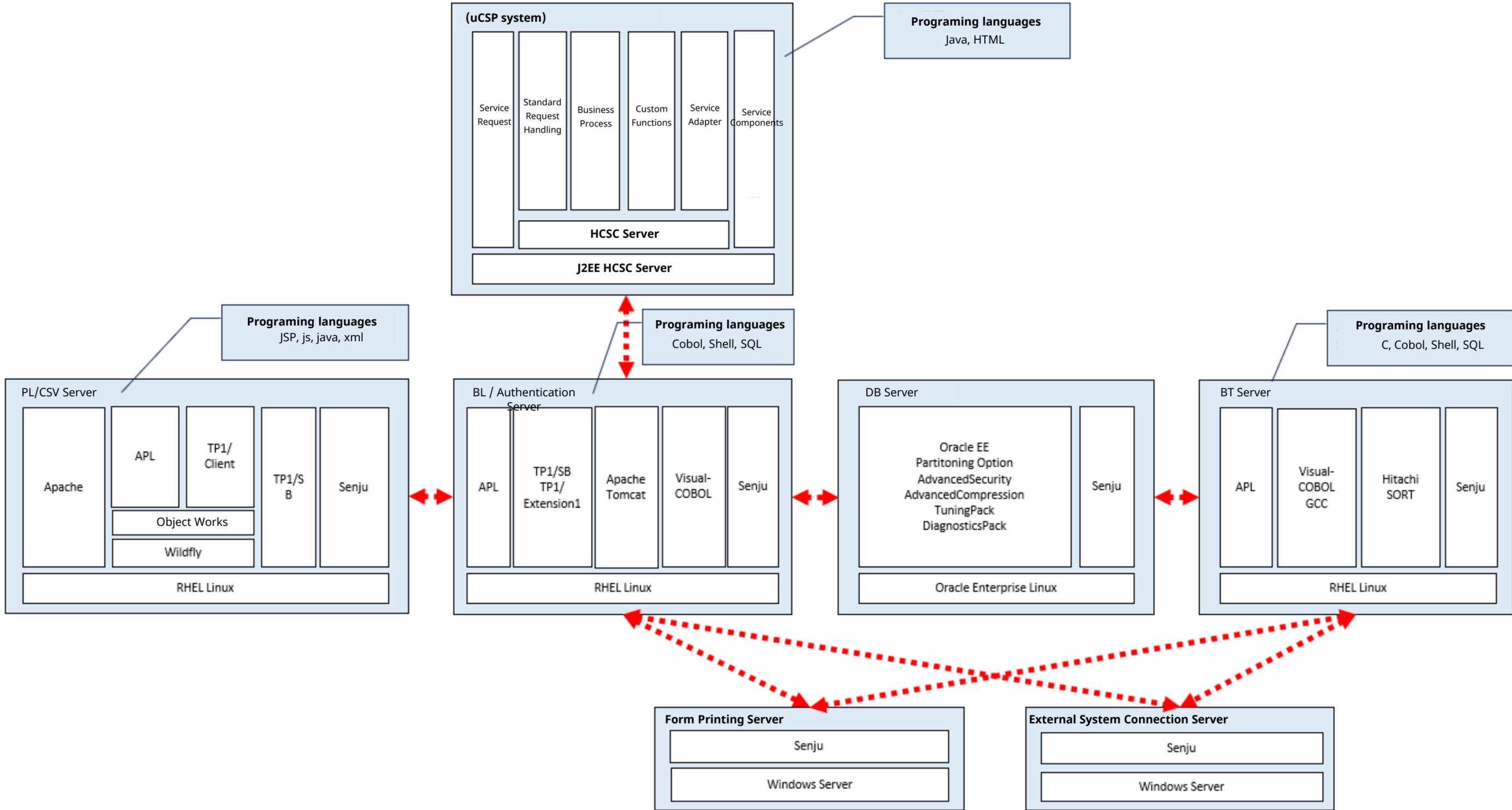
Internal systems for billing, information management, electronic processes, and business administration.

## 6. Concurrent connections

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



# Overall System Model





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# MILESTONES & RESOURCES



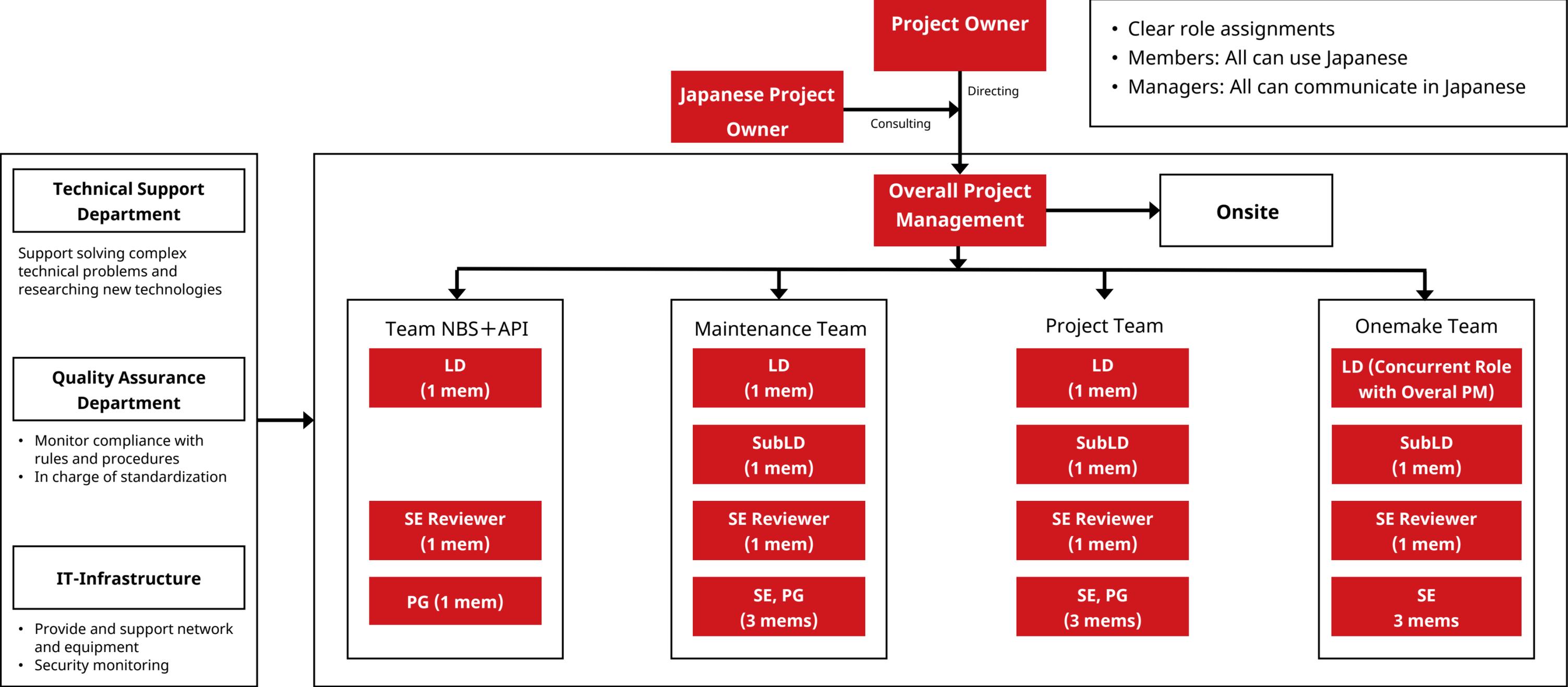
# Team Achievements and Project Progression

Year	2012	2013	2014	2015	2016	2017
<b>Milestones</b>		▲ Apr 2013: Official development started		▲ Nov 2015: Maintenance phase started		▲ Apr 2017: NBS development started
<b>Key Activities</b>	Preparation & Trial phase		Official project with de velopment requirements		Development & maintenance of LGP server	NBS pilot phase
<b>Workload Ordered (MM)</b>	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



<https://luvina.net/>



[info@luvina.net](mailto:info@luvina.net)



Tel: (84) (24) 3793 1103 (ext 0)

Fax: (84) (24) 3793 1106

## OUR OFFICES

**Headquarter in Hanoi, Vietnam:** 4F, Hoa Binh Tower, 106 Hoang Quoc Viet Str., Nghia Do Ward, Hanoi City, Vietnam.

**Branch in Da Nang, Vietnam:** 18F, 2 Quang Trung Str., Hai Chau Ward, Da Nang City, Vietnam.

**Branch in HCM City, Vietnam:** 38/1 Nguyen Van Troi Str., Cau Kieu Ward, Ho Chi Minh City, Vietnam.

**Branch in Japan:** R612, Kanagawa Science Park (KSP), 3-2-1 Sakado, Takatsu-ku, Kawasaki-shi.

**Representative office:** 38N Almaden Blvd, Unit 125, San Jose, California 95110-2720, United States.