TRILLIUM

POSIT CONNECT

Responding quickly in a volatile market: complex reports delivered over 50% faster with 6-months of Posit Connect





"Before Posit, it could have taken a couple of days to get a report with data that was a couple days old. Now, I can have something running every night to see: Do I need to make a change? Do I need to adapt here? How should I think about this?"

BENJAMIN BALLER, MANAGING DIRECTOR OF TRADING AT TRILLIUM

Trillium is a leading proprietary trading firm using advanced analytics and sophisticated technology to empower their traders to excel under all market conditions. They provide ongoing training and mentorship, access to a robust trader resource center, the capital to trade, and a supportive, collaborative environment for a long and lucrative trading career.

To increase their expertise and earning potential, traders would often ask: How do I compare to others in my role? How am I doing in terms of specific milestones at this point in my career? How should I be performing in 1 year?

> "What gets me most excited about Posit is that we've been using the tool for 6 months or so now, and it really feels like we're just scratching the surface. A lot of our [current] reporting is internal for management and we're now experimenting with reports for individual traders...We're also excited about the possibility of adding AI into some of these projects. The possibilities seem somewhat endless."
>
> Benjamin Baller
> Managing Director of Trading at Trillium

From Spreadsheets to Success: Trillium's Data-Driven Transformation with Posit

While Excel has long been an indispensable tool within the financial services sector, facilitating daily transactions worth billions through spreadsheet workflows, spreadsheets present challenges including limited reproducibility, data size constraints, and cumbersome visualizations. The analytics team at Trillium Trading became constrained by manual processes and Excel workbooks and sought alternatives for streamlining their workflows.

Although analysts were also creating data-driven static HTML reports, they had trouble sharing these in a secure manner with different stakeholders and when asked to re-run reports, they would end up with 10 different versions of it. They needed a secure, centralized place to share their reports, ensuring only specific employees could see specific performance data.

In search of a secure solution that would also provide more interactivity for trading managers and greater flexibility compared to conventional BI and dashboarding tools, they chose Posit Connect.

While Trillium is just getting started on their journey with Posit, here is a snapshot into the ways they are leveraging Posit Connect for better decisions in just 6 months!

- **Management Tools**: Trading managers can now gain insights into their equity traders' performance using Shiny and Dash applications deployed on Posit Connect. These centralized applications eliminate the need to manually compile data for team performance reports, a previously time-consuming process. Managers can now easily track newer traders' progress, assess risk through performance analysis, adjust parameters within the application, and export data to CSV or Excel formats as needed.
- **Individualized trader reports:** "Trader Wrapped" (a concept similar to Spotify Wrapped), were generated for all traders, providing a summary of their individual trading data. A standardized template was developed and then used to produce each of the trader specific reports.
- **Complex research reports**: Reports that previously took 2 months now take only 3-4 weeks, even as they are still refining their process.
- **Custom front-end dashboards:** Traders and trade managers can immediately see the reports that were made for them through an internal website. The ability to customize the aesthetics and UI/UX for end users was crucial to the team.
- **Behind the scenes ETL:** Scheduled reporting on Connect has significantly reduced friction for the team in validating and updating their database. This once manual process is completely automated, with the team now receiving a daily email each morning confirming all databases are updated with no errors.

Posit's impact on the business is significant, leading to improvements in hiring, people management, and the guidance provided to traders.

Ben Baller, Managing Director at Trillium adds, "The ability to access up-to-date, granular data empowers better and faster decision-making compared to the lag experienced before Posit." This translates directly to real-world impact for Trillium in a fast-moving market, where they may need to give traders additional tools or ability to take on risk in a smart and sophisticated way.

"Posit Connect has been really empowering as someone who doesn't have a background in web development. The Shiny and Dash frameworks are all about getting it up and running in a streamlined way, and it's really raised the ceiling on the types of analytics reports I can deliver to stakeholders. I can make them much more polished, faster, and less buggy than when I was stringing together static HTML reports and Excel workbooks."



TREY HENDRIX, DATA ANALYST AT TRILLIUM

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