

CASE STUDY



Leading Integrated
Financial
Services Firm
Reduced
overall RTO By
50%

About the Client

Our client Company is a subsidiary of a leading Private Bank, is a leading integrated financial services firm in India, headquartered in Mumbai. It provides retail/ institutional broking, financial product distribution, and investment banking, serving diverse clients. Client is known for its digital evolution, utilizing technology for high-volume, secure data management.

Key Profile :

- Core Business Pillars: Retail Broking, Institutional Broking, Investment Banking (ECM, M&A), and Wealth Management.
- Key Platform: Client offers a premier platform offering investment solutions to over millions of customers.
- Strategic Focus: "Creating Informed Access to the Wealth of the Nation," with a strong emphasis on technology-driven retail growth.
- Market Position: One of India's oldest and largest financial intermediaries with a massive client base.
- Operational Footprint: Headquartered in Mumbai with a significant presence across India and global offices in Singapore and New York.
- Technology/Operations: Client has implemented robust, automated data transfer protocols for high-volume, secure data processing.
- Marketing/Retail: Successful deployment of digital reward programs to enhance customer engagement.

Client Challenges

- Securities Company was missing a Disaster Recovery (DR) plan for their business and core service application environment.
- The client had difficulty managing the complex heterogeneous IT infrastructure supporting their application
- Two applications are spread across 171 Virtual machines was a challenge to define runbook and perform the DR drills.
- Lack of visibility on DR infrastructure and the readiness of DR to take over the role of primary.
- Client also required DR automation to reduce the RTO of their applications spread across branches and minimizing the dependency on SMEs for conducting the DR Activities.
- Client needed a unified Dashboard to view all applications from a single window.
- Client was missing the compliance on reports as per SEBI guidelines.

Our solution

- Implementation of Continuity PatrolTM orchestrated the recovery of applications at the DR site using customized recovery plans.
- Successfully configured Two Applications used by the client for disaster recovery, Application operating system environment being a mix of Windows and Linux operating system environment.
- Replication systems used were Oracle Data Guard, MSSQL Always ON
- Successful configuration of Switchover/Switchback workflow for Application and Database tier in Continuity PatrolTM.

- Alert notification through Email & SMS.
- Successful Switchover and Switchback for in-scope Applications & Database tier during drill within agreed RPO of 30 Minutes and RTO of 45 Minutes.
- ISO 22301 Standard DR drill reports for audit and compliance.
- Visibility into the availability of various applications through Unified Monitoring Console.
- SSH Key authentication for secured access

Results and Benefits to Business

- Reduced overall RTO By 50%
- Dependency on SMEs was considerably brought down
- TCO Optimization Achieved by reducing number of resources required to conduct the DR Drills.
- faster availability of application through single click automated DR processes
- ISO 22301 standard DR Drill Reports and RPO SLA Reports.
- Better visibility of application service availability via dashboard.

Key Metrics

50%

REDUCED OVERALL RTO

30 MinAGREED RPO –
SWITCHOVER AND
SWITCHBACK DURING
DRILL**45 Min**RTO – SWITCHOVER
AND SWITCHBACK
DURING DRILL**1-Click**FASTER AVAILABILITY
OF APPLICATION
THROUGH SINGLE
CLICK AUTOMATED
DR PROCESSES

READY FOR YOUR OWN SUCCESS STORY?

Get in touch with our automation experts and learn how you can fast-track your digital transformation initiatives.

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About Perpetuuiti

Perpetuuiti empowers people and businesses alike. We deliver the world's most comprehensive and urbane automation platforms, making work more human. Our platforms deliver leading-edge automation for modernizing resiliency management and turbocharging the performance of your applications, IT and business operations at speed and scale to drive exponential efficiencies.

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