



# Industrialize your models, tools and processes with the Jacobi SDK

The Jacobi Software Development Kit (SDK) enables quantitative analysts and developers to build their own unique tools, models and applications on the Jacobi platform. Using the SDK firms can develop unique:



## Graph scripts

Create custom models and visualizations that can be shared with colleagues and clients, and used in dashboards, applications and reports throughout your platform.



## Data processes

Connect, calculate, transform and automate data to support different use cases. The Jacobi API enables in-app tasks to be performed programmatically and used to connect with 3rd-party or in-house systems.



## Applications

Build highly custom workflow tools using Dash or React frameworks while leveraging the entire Jacobi infrastructure and componentry.

## Benefits of the SDK

Building custom tools onto Jacobi allows investment managers to accelerate the speed of their development, lower technology costs and improve governance.

### Prioritize the tools you develop in house

Free up time to focus on highly custom, value-add tools by utilizing Jacobi's out-of-the-box functionality for standard investment analytics, displays and workflows.

### A stronger data foundation

Improve data consistency and benefit from a scalable data model that combines investment-oriented objects with highly flexible 'Jacobi Tables' for unique data sets.

### Extensive user controls

Leverage a wide range of Jacobi user controls and interfaces in a no-code framework to simplify, standardize and accelerate the coding process and improve the experience for end users.

### Use your preferred libraries

Use your preferred Python libraries for mathematical and modeling calculations, Plotly data visualizations and displays, as well as Dash and React application templates.

### Govern and control tool deployment

Deploy tools via a command line interface, integrated into your existing continuous integration/development processes. Utilize separate testing/staging and production environments.

### Reap the full Jacobi benefit

Use your custom tools throughout the platform, such as in reports, dashboards and workspaces, combined in scalable cloud infrastructure with extensive security and user permissioning

## No longer a 'build vs buy' decision

Capture the benefits of both internally and externally built approaches. Jacobi's highly scalable infrastructure is designed solely for investment organizations and by integrating your unique tools and models, preserve and enhance your competitive edge. See the example use cases below:

### Portfolio optimization

A custom application for portfolio optimization, augmenting a Black Litterman approach.

### Asset and liability management

Graph scripts for custom calculations and visualizations of ALM and liability-driven investment analytics.

### Model portfolio management

A custom application to manage a large number of model portfolio ranges, distributing those to wealth managers and advisers with task management features.

### ESG data integration and enrichment

Graph scripts to enrich, analyze and aggregate issuer-level ESG data, embedded into portfolio construction and monitoring processes.

### Endowment spending model

A custom application for modeling endowment spending, combining cash flow and stochastic analysis, incorporating unique private assets.

### Portfolio FX hedging

A custom application to monitor and calculate FX hedging across a suite of multi-asset funds.

### Getting Started

Jacobi investment engineers help to train SDK users in your organization, supplemented by extensive training resources and technical documentation. SDK users are typically quantitative analysts or software engineers familiar with coding using Python (or other languages). For clients with limited coding and quantitative resources, Jacobi engineers are also on hand to perform custom services.

### About us

Jacobi was founded in 2014 with a vision to transform multi-asset portfolio design, management and engagement. Jacobi provides its services to top-tier investors across the globe with a client base who represent assets under management of over US\$7 trillion. Jacobi is headquartered in San Francisco and has offices in Australia and the UK.

### Our clients include



### Get in touch

For more information on Jacobi's highly customizable technology to support the scaling of investment processes and client engagement.

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