

BondWave Enhances Effi Platform with New Transaction Quality Analysis Solution and Premium Content Access

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BondWave LLC, a leading financial technology firm focused on fixed income solutions, announced today that it has added a new Transaction Quality Analysis (TQA) solution to its Effi® platform that allows users to measure their total trade costs and compare them against relevant peers in the marketplace. The latest version of Effi also provides users with seamless access to premium municipal bond content directly within the platform.



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With BondWave's TQA solution now available within Effi, users can measure total costs for their trades and compare them against a peer benchmark, providing essential context into the true quality of their executions. The solution also empowers users to measure and rank the performance of their counterparties, ultimately leading to more favorable trading outcomes in the future. In addition, the solution provides a detailed archive for every calculation, as well as a robust management reporting tool.

Following BondWave's partnership with DPC DATA in September 2024 and acquisition of Bitvore's Fixed Income Data Analytics business in November 2024, Effi now enables users who are subscribers of BondWave Muni News (formerly Bitvore Muni News) and DPC DATA's MuniPOINTS® fact sheets to seamlessly access the content within the platform. With this new capability, users are equipped with BondWave Muni News' curated municipal news mapped to the individual CUSIP level, with monitoring, email notifications, and links to source articles at their fingertips. Users can also access concise municipal fact sheets with key information extracted from official statements, as well as related disclosure documents via DPC DATA's MuniPOINTS.

The latest version of Effi also includes additional enhancements to various features within the platform's [Portfolio Analytics](#) and [Transaction Analytics](#) solution suites, including:

Portfolio Analytics

- Fixed Income Analysis Report – A new component to group CD positions by FDIC certificate number has been added, allowing users to determine if their CD holdings exceed the standard FDIC insurance limit.
- Household Numbers – Since many custodians do not provide household numbers in the nightly feed, the ability to manually maintain household numbers in the system has been added, allowing for an efficient grouping, filtering, and running of reports across multiple related accounts.
- Rules – Users can now create a rule for the average option-adjusted duration for a portfolio with the ability to set a minimum, maximum, and/or target value for the portfolio. The ability to factor cash into the calculation has also been added.

Transaction Analytics

- Trade Oversight's Trade Details Page – Users can now view certain information from the confirm file extracts within the UI, including date/time, if the account was on the disclosure exempt list, and disclosure status.
- Market Calculator – Calculation capacity has been increased from five to 50, and documentation associated with a calculation or trade can now be included in the Calculation Details report.

"With these enhancements to the Effi platform, we're furthering our mission to enable our clients with the best tools to make informed investment decisions, better service their clients, and grow their fixed income business. This latest release showcases our close collaboration with the industry by incorporating feedback that improves workflows and creates operating efficiencies," said Michael Ruvo, CEO of BondWave.

"We value our ongoing collaboration with BondWave, and we're pleased that MuniPOINTS is delivering real value to Effi users by providing clean, concise municipal bond information. This partnership is a great example of what happens when accurate, easy-to-use data meets innovative technology," said Ken Hoffman, President of DPC DATA.

BondWave also added a user guide to the Effi platform to assist with ongoing support. Within the guide, the menu of content is specific to each user's entitlements.

To learn more about Effi, visit bondwave.com.

About BondWave LLC

Founded in 2001, BondWave® is a financial technology company focused on fixed income solutions that empower our clients to more efficiently manage and grow their fixed income

business. We serve a wide range of clients, including traders, compliance professionals, RIAs, and asset managers, who use our tools to provide a superior fixed income experience to their clients while supporting critical regulatory mandates and optimizing workflows.

Effi®, our Engine for Fixed Income, is the single platform through which we deliver all our solutions - providing intuitive dashboards and insights into every fixed income position and transaction to drive informed investment and business decisions. Effi's capabilities include Portfolio Oversight, Trade Oversight, and curated Muni News. Our solutions are fueled by proprietary data sets that are developed using AI, machine learning technologies, and advanced data science. To learn more about BondWave, visit bondwave.com.

Media Contact

Carly Gray

Buttonwood Communications Group

(631) 560-8958

cgray@buttonwoodpr.com

Sales

BondWave

info@bondwave.com

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