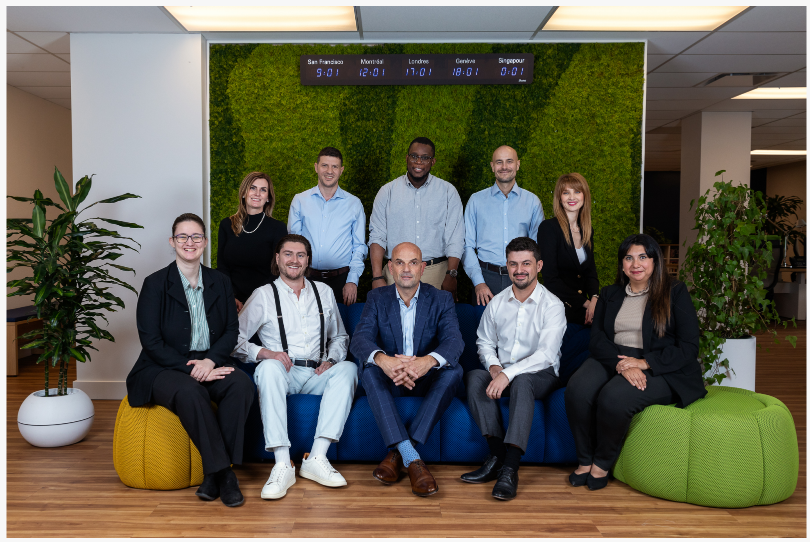
Digital Shape Technologies Launches Webfolio® 2.92: Breach Management, Bloomberg Fixnet and Public API

Digital Shape Technologies launches Webfolio® 2.92: compliance breach management, Bloomberg Fixnet integration and a public API for asset managers.



The team behind Webfolio® by Digital Shape Technologies Inc.

MONTREAL, QUEBEC, CANADA, June 16, 2026 /EINPresswire.com/ -- Digital Shape Technologies Inc., publisher of the multi-asset portfolio management platform Webfolio®, today announces the official release of version 2.92. This major update places compliance automation and the reduction of operational risk at the center of its development, directly addressing the growing requirements of institutional asset management teams, family offices and private banks.
Founded in 1999 in Montréal, Digital Shape Technologies has more than 600 active users across 17 financial hubs around the world, with more than $5 trillion in assets under management supported by the platform. Webfolio® 2.92 is available immediately to all clients under a maintenance contract.

> The 2.92 version of Webfolio® marks a major evolution of our platform, now built on a technology foundation designed for the era of generative and agentic AI.”
>
> *Régis Lamy, President, Digital Shape Technologies Inc.*

A dedicated module for compliance breach management

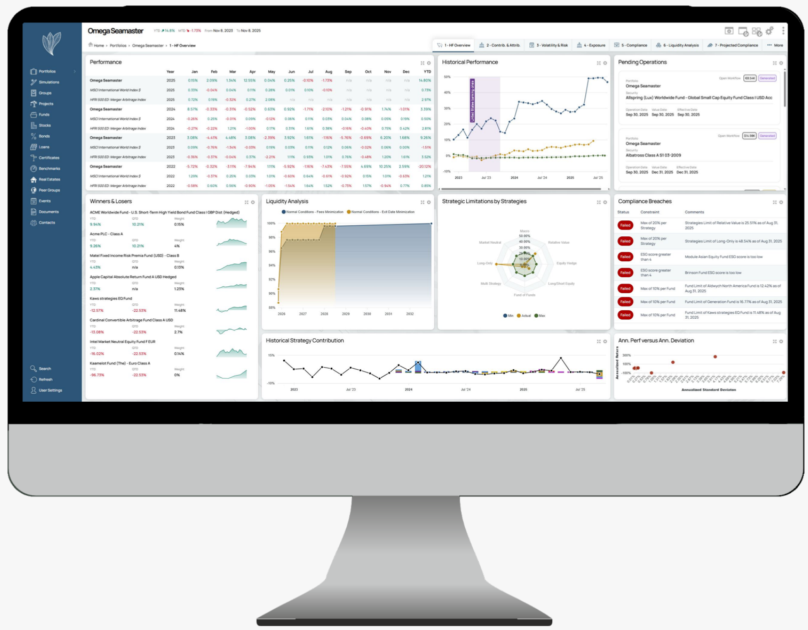
The most significant new feature in this release is the Security Breaches module, which automates the justification process for breaches of portfolio constraints. When a constraint is breached, the system automatically triggers a justification request to the relevant stakeholders, portfolio managers and compliance officers. Exchanges are tracked, timestamped and archived

in a complete history accessible from the Web interface.
The workflow includes a clear segregation of roles between management teams and compliance teams. Once the justification has been validated, the constraint can automatically be classified with the “Explained” status, ensuring full traceability for auditors and regulators. This module is available from the Webfolio® desktop application and from the Web App interface.

Key features of the Security Breaches module:

Automatic triggering of a justification request when a constraint breach occurs
Complete history of exchanges between portfolio managers and compliance officers
Validation workflow with automatic “Explained” status
Interface accessible from the Webfolio® desktop application and from the Web App

Webfolio® logo – Digital Shape Technologies – multi-asset portfolio management platform



Discover Webfolio®: reduce institutional portfolio management time

Automatic correction of back-dated transactions and support for PIK loans

The Auto-fix Back-date module, available as an option, automates the management of the impact of transactions modified after a portfolio’s freeze date. When a retroactive modification is detected, the system automatically generates the correction transactions: an opposite transaction to the one initially entered, known as a reversal, and a new transaction reflecting the amended parameters.

This automation eliminates manual interventions and reduces the risk of accounting errors in complex portfolios.

Webfolio® 2.92 also introduces full support for private debt with capitalized interest and PIK, Payment-in-Kind, interest, including the definition of fixed or variable coupons, detailed interest calculations and the anticipation of future cash flows by the front office through the reallocation tool. Managers can therefore visualize the future impact of PIK interest on available cash by currency and by period.

Bloomberg Fixnet connector and new data providers

Webfolio® 2.92 integrates a new native connector to the Bloomberg Fixnet platform via the FIX protocol. Trading orders are automatically transmitted from Webfolio® to Fixnet, and execution confirmations are automatically retrieved to update transactions in the platform. The integration fits into Webfolio®'s usual workflow, with fully customizable notifications and messages.

Many new data providers are also available as standard in this version: Allocator, Albourne, Aladdin, etc. The synchronization activity log has also been enhanced to provide, in one place, a complete view of active background data flows and their impacts on the information system, including the audit log, data file content and modification history.

A public, stable and long-term REST API

Version 2.92 introduces a public REST API, independent from the Web App's internal API.
This architecture guarantees the long-term stability of integrations, while allowing Digital Shape Technologies to continue evolving the platform without impacting its clients' developments.

Dynamic Extensions: full autonomy over your data

Now essential, Dynamic Extensions allows users to design their own analyses, reports and communications, without relying on technical teams.
Thanks to a fully integrated builder, it is possible to create custom analytical tables, web pages and personalized emails by freely selecting the data to be used. A new distribution module now makes it possible to automate the sending of personalized emails to external lists, with fine control over the information shared.

A modernized infrastructure for greater performance and security

This version marks a major evolution of the infrastructure with the migration to Java 21 and Wildfly 35, as well as native clustering support for improved scalability and high availability.

The integration of OIDC authentication also makes it possible to easily interface with existing identity systems and strengthen overall security.

New visualizations, reallocation tool and DDQ module

The Webfolio® Web App benefits in this version from a new charting library including Heat Maps, Box Plots, Polar Charts, Spider Charts and Radial Charts. These new types of visualization, combined with the Dynamic Extensions module, open up many new possibilities for data visualization.
Portfolio comparisons and simulations, statistical analysis of Peer Groups: the wide range of

visualizations available makes it easier to highlight the strengths of your management.
The front-office reallocation tool has been completely redesigned, with a standardized presentation of assets, quick access to allocation limits, a session summary and a complete trading form with dates and accounts. The new Due-Diligence Questionnaires module provides a structured framework for evaluating assets through weighted DDQ questionnaires, with automatic scoring, evaluation traceability and visual progress indicators.

Digital Shape Technologies Inc. is a Canadian financial technology company founded in 1999 in Montréal, Québec.

The company develops Webfolio®, an integrated multi-asset portfolio management platform designed for institutional investors: asset managers, family offices, private banks, fund managers and fund administrators. The platform supports more than 600 active users across 17 financial hubs around the world, including Montréal, New York, London, Geneva, Zurich, Luxembourg, Singapore and Hong Kong, with more than $5 trillion in assets under management.

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