



Collaboration. Experience. Commitment.

Institutional Markets

We are a women-owned broker-dealer that provides outstanding financial services to some of the largest institutions in the world. Our focus has always been on developing long-term relationships with our clients that help them both meet their diversity initiatives and achieve the best results in their financial operations.

Services



Institutional Trading



Corporate Finance



Public Finance

Institutional Trading

America's Women-Owned Trading Desk®

Our *Client Focused Trading (CFT)*® approach allows us to bring a buy-side mentality to every transaction. With over 30 years of experience, our trading desk makes decisions that consistently protect our clients' bottom lines through disciplined processes, thoughtful execution, and creative collaborative partnerships.



- Equity, fixed income, options, and currencies trading
- Real-time market updates and portfolio news
- Corporate stock repurchase programs
- Hedging expertise using options and ETFs
- Competitive margin lending through our clearing brokers
- Trading for global markets
- Post-trade performance analysis



Corporate Finance



- Financial planning & analysis
- Working capital management
- Operating & capital budgeting
- Mergers & acquisitions
- Strategic planning

- Advisory services for derivatives products
- Bidding agent services for reinvestment products
- Capital loan financing placement
- Financial strategies and structures of tax-exempt and taxable offerings
- Derivative solutions to meet the needs of a wide variety of organizations

Public Finance



We are a natural partner for institutions that look to team up with a women-owned firm that creates value through high-touch client service, collaboration, and execution quality.

GET IN TOUCH



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