

Enabling Family Offices to Develop Institutional-Grade Stock Trading Algorithms

Prepared by: Macro Global Markets
AFSL 363972 | Regulated Wholesale & Retail Broker | Australia

Executive Summary

This whitepaper outlines how Family Offices can harness institutional-grade algorithmic trading infrastructure through Macro Global Markets. With a focus on client-controlled execution, long-term strategy design, and risk-aware frameworks, this guide introduces an approach built for capital preservation, income generation, and operational transparency, all under an AFSL-licensed structure.

The Evolving Investment Landscape for Family Offices

Traditional discretionary investment methods may not scale well across generations or market conditions. Family Offices are now seeking systematic approaches that combine transparency, control, and defensive strategy logic.

Who This Is For

You've built the legacy, fortified the future of your Family Office, now you're entering the next stage of wealth preservation: building a stable, intelligent income flow for generations to come. Stay invisible to the public but connected to your professional support framework, using algorithmic trading tools that are built for long-term stewardship.

What We Offer

Client-controlled, automated execution and strategy design. Built on proven frameworks and transparent templates, your team can fully understand every line of logic behind the algorithm's decisions. We help embed protections and intelligent design choices into the code, layering portfolio management strategies with defensive logic to last decades, even centuries.

Why It Matters

Preserving family wealth while responsibly growing capital is an ongoing challenge. Markets move quickly, and ad-hoc judgement may no longer suffice. Thoughtful, rules-based strategies grounded in logic, data, and risk management provide a foundation that supports stability across generations.

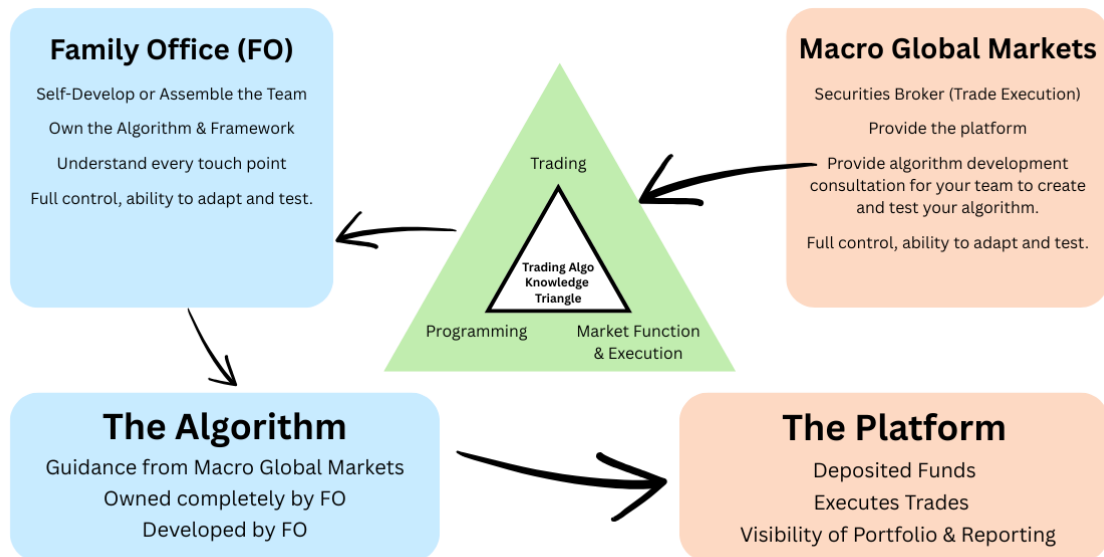
How It Works

We provide:

- AFSL-regulated execution and reporting via our securities brokerage.

- Technical support in designing and testing your strategy
- Education and guidance for family members or analysts
- Tools like Jupyter Notebooks, back testing frameworks, and order flow controls

You receive hands-on coaching and implementation assistance, learning as you go, ensuring you retain full oversight and internal capability.



Case Study

A second-generation FO with \$20M in liquid assets wanted to diversify their passive ETF holdings. With our support, they were able to build a long-only strategy aligned to dividend-paying equities with volatility protection. Their analysts now run monthly back tests and strategy reviews, all fully compliant, fully client-owned.

What You Get with Macro Global Markets

AFSL-Regulated Infrastructure: You operate within the oversight of an Australian Financial Services Licence, ensuring compliance and credibility.

Client-Owned Systems: Your capital, data, and strategy remain entirely under your control, we provide the rails, putting you in the driver's seat.

Transparent Strategy Logic: Every rule and condition is visible, editable, and explainable. No black boxes.

Education and Strategy Support: We help you and your internal team understand, refine, and run your strategy effectively.

Execution-Only Services: We don't manage money or give personal advice, our neutrality protects you from conflicts of interest.

When To Begin

Schedule a complimentary information session to explore how our execution platform, education, and development support might align with your internal objectives. Building a solid algorithmic foundation takes time to test, refine, and implement. We take a long-term, methodical approach to development that supports your operational control and compliance expectations.

Begin the Strategy Design Conversation

If you're ready to explore how algorithmic strategy development and transparent execution can support your internal investment infrastructure, we're here to assist.

- Learn how to leverage our platform, tools, and AFSL oversight
- Understand the development timeline and setup process
- Begin planning a pilot or concept phase with your internal team

Contact:

Macro Global Markets

AFSL 363972 | www.macrogmsecurities.com.au

Email: support@macrogmsecurities.com.au

Glossary of Key Terms

AFSL (Australian Financial Services Licence) – A licence issued by ASIC authorizing a firm to provide financial services under Australian law.

Algorithmic Trading – The use of coded rules and logic to automate the buying and selling of securities.

Backtesting – A process of testing a trading strategy using historical market data to assess performance and risk.

Client-Controlled Execution – A structure where the client retains full authority over trading decisions, position sizing, and risk management, even when using algorithmic strategies.

Drawdown – The peak-to-trough decline of an investment or portfolio over a given period.

Execution-Only – A service where no personal financial advice is given, and all investment decisions are made by the client.

Jupyter Notebook – An open-source tool used for writing, testing, and visualizing algorithmic strategies in Python.

Risk Management – A set of processes embedded in a strategy or operation to limit potential financial losses.

Systematic Strategy – A trading or investment strategy that is based on pre-defined rules and executed consistently without discretionary overrides.

This document is general in nature and does not constitute financial advice. All strategies referenced are illustrative only and may not be suitable for all investors. Macro Global Markets does not offer personal advice and provides services on an execution-only basis.