

## ***CaixaBank launches a financial positions aggregator with a consolidated, daily-updated and global view, helping its private banking clients to manage their wealth across financial institutions***

- ***GlobalView, CaixaBank Wealth Management's new service, will initially be offered at no additional cost to its Global Wealth independent-advisory clients, and will be progressively rolled out to more private banking clients.***
- ***The service is the result of a collaboration between CaixaBank Wealth Management and Flanks, a WealthTech company, regulated by the Bank of Spain.***
- ***Once the client's financial positions have been consolidated, they are all integrated into CaixaBank Wealth Management's GPS platform, powered by BlackRock's Aladdin Wealth™ technology, enabling a more comprehensive and sophisticated global wealth analysis for clients.***

**15 April 2026**

CaixaBank has launched GlobalView, its global financial positions aggregator, which enables the bank's Wealth Management clients—the entity's private banking division—to consolidate and analyse all their financial positions across multiple financial institutions under a single, unified framework. With this solution, the bank simplifies access to and analysis of clients' financial information by integrating multi-custodian positions and providing a unified view of their wealth.

The service is the result of a collaboration between CaixaBank Wealth Management and [Flanks](#), a European WealthTech company regulated as an AISP by the Bank of Spain, with extensive experience in PSD2 solutions. Flanks will be responsible for the automated connection, daily data collection, and standardization layer that makes this possible.



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Combining the expertise of CaixaBank and Flanks has made it possible to overcome the technical complexity of automatically aggregating positions. Flanks' technology will ensure secure bank-to-bank connectivity and the quality and depth of the data received, given its global coverage of more than 600 connections with financial institutions in 33 countries, as well as its ability to extract, normalize and enrich position data from any custodian and deliver it in a format CaixaBank can act on to generate a single view of the client's *asset allocation*.

Once the client's financial positions have been consolidated, they will all be feed directly into CaixaBank Wealth Management's GPS platform, powered by BlackRock's Aladdin Wealth™ technology. In this way, CaixaBank opens up the advanced analytical capabilities of its GPS platform to external financial positions, including those held at institutions that do not provide as much detail in their platforms or that do not offer analytics as sophisticated or as in-depth as GPS.

As a result, GlobalView will enable CaixaBank relationship managers to offer clients a more complete, integrated global wealth analysis that aligns all positions under the same criteria and is updated daily, making it easier to manage their wealth day to day.

According to **Belén Martín**, Head of CaixaBank Wealth Management: "This service represents a milestone in Spain's banking sector, as it allows clients to take ownership of the information held by the financial institutions they work with. In a market where high-net-worth clients tend to diversify their investments across multiple entities, CaixaBank positions itself at the forefront by offering a sophisticated and innovative positions aggregator".

To use GlobalView, CaixaBank clients must explicitly consent to the service being enabled and to the transmission of their data. Once consent is provided, GlobalView will establish connections with the selected financial institutions automatically, providing the requested information on a single platform, without no manual data entry or password management required.

The aggregator will provide clients with a global view of their wealth, broken down by financial institution, asset type, product family, and currency. For each product type, it will also provide more detailed information. For example, for fixed income investments, it enables clients to see the overall position by issuer type, geographic distribution, credit rating, or maturities; and for equities, the distribution by sector or geography. This way, clients can understand their exposure to each product or strategy, run simulations of different historical and market risk scenarios on the aggregated portfolio, and make management and investment decisions with a consolidated, global view.



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The information provided by GlobalView will be for clients' informational use only and does not entail changes to the advisory service, since the CaixaBank relationship manager may only provide advice on the assets the client holds with the bank, and not on positions held with other institutions.

The first phase of the launch will initially focus on CaixaBank's Global Wealth clients—those with an independent advisory contract and more than €4million in assets—who are able to use the service included in their current service fee. It will be extended progressively to the broader private banking division.

GlobalView is part of CaixaBank's commitment to providing pioneering, advanced, and personalised services for its clients, in response to a growing regulatory and competitive pressure on European wealth managers, ahead of the FIDA regulation, which will come into force in 2027 and will regulate the access, custody, and use of customers' data across the European financial system.

## About Flanks

Flanks is a WealthTech company redefining the industry through AI-powered automation and data-led insights. Its AI wealth data platform for financial advisors empowers global financial institutions - including banks, family offices, asset managers, pension plans providers, and tech companies - to deliver faster, high-quality, and personalised advice. Flanks provides a unified view of all asset classes, including alternatives, and leverages proprietary AI models to transform complex, fragmented wealth data into actionable insights. Founded in 2019 in Barcelona by Joaquim de la Cruz, Sergi Lao and Álvaro Morales, former Global Head of Santander Private Banking. Flanks now processes over 500,000 portfolios monthly across more than 15 countries, managing more than €39 billion in assets. For more information, visit [flanks.io](https://flanks.io).

