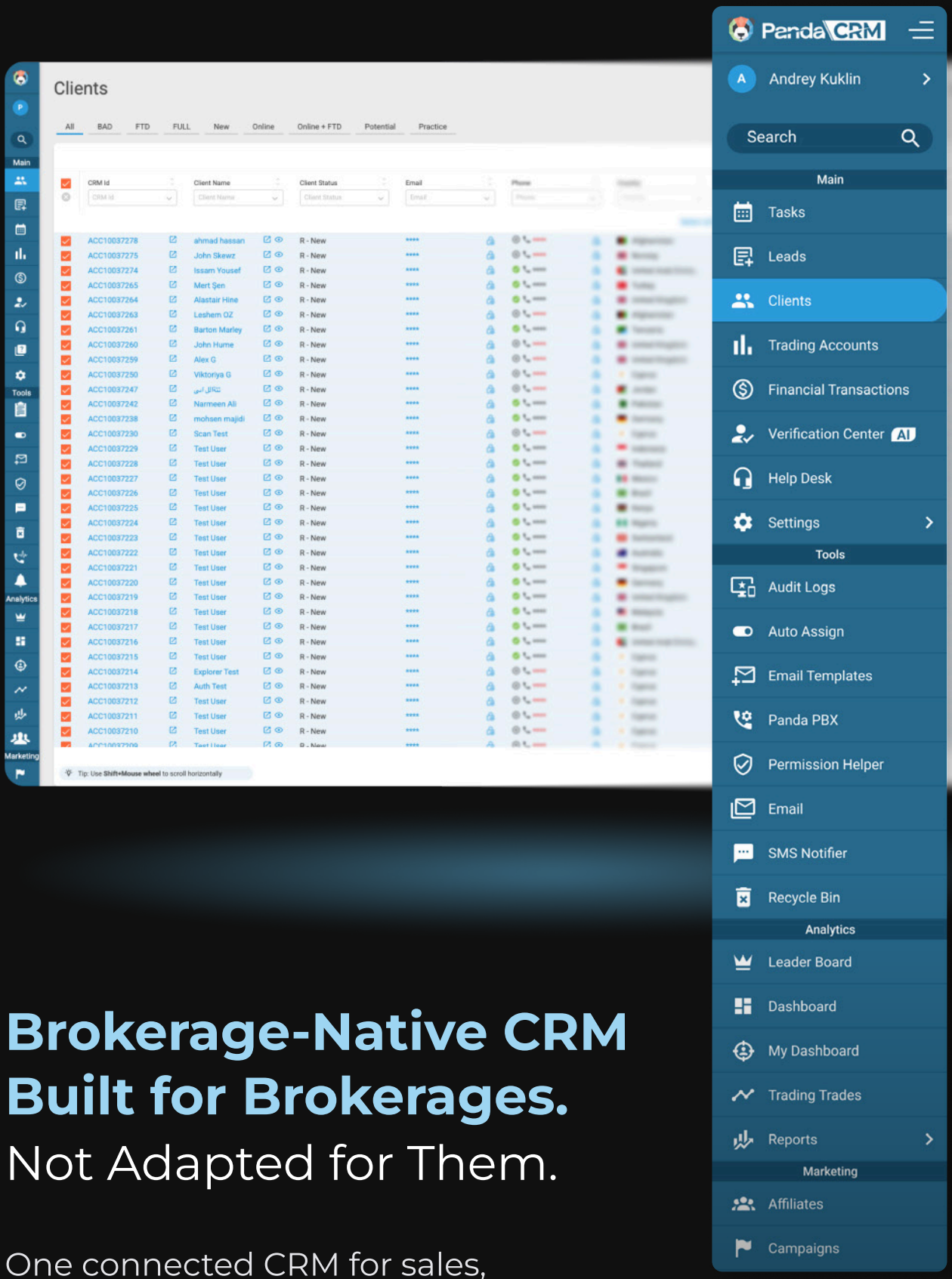


PRODUCT

Panda CRM

Brokerage-Native CRM Built Specifically
For FX & CFD Brokers

Panda
TRADING SYSTEMS



Brokerage-Native CRM Built for Brokerages.

Not Adapted for Them.

One connected CRM for sales, retention, compliance, and operations.

About Panda Trading Systems

Nearly Two Decades of Brokerage Technology Innovation

Since 2006, Panda Trading Systems has been building brokerage technology designed specifically for forex and CFD brokers. From a startup in Haifa to a global brokerage technology provider, PandaTS has continuously evolved its infrastructure to support regulated brokers operating in highly competitive environments.

Today, PandaTS provides a complete brokerage ecosystem that includes CRM infrastructure, Client Area, WebTrader, mobile applications, trading server infrastructure, social trading, IB management, risk management tools, and operational automation systems.

Built around scalability, automation, and operational efficiency, PandaTS solutions help brokers centralize operations, improve client experience, and manage brokerage activities from one connected environment.

20+
Years
Powering Brokerages

300+
Prebuilt Integrations

400+
Brokers Served Worldwide

Milestones

2026 Expanding brokerage infrastructure solutions for regulated brokers worldwide

2024 Full redesign and modernization of PandaTS product suite

2022 Major expansion of Panda CRM and Panda Trader infrastructure

2019 Launch of COOMA Social Trading ecosystem

2014 Launch of Panda FX Trading System 2.0

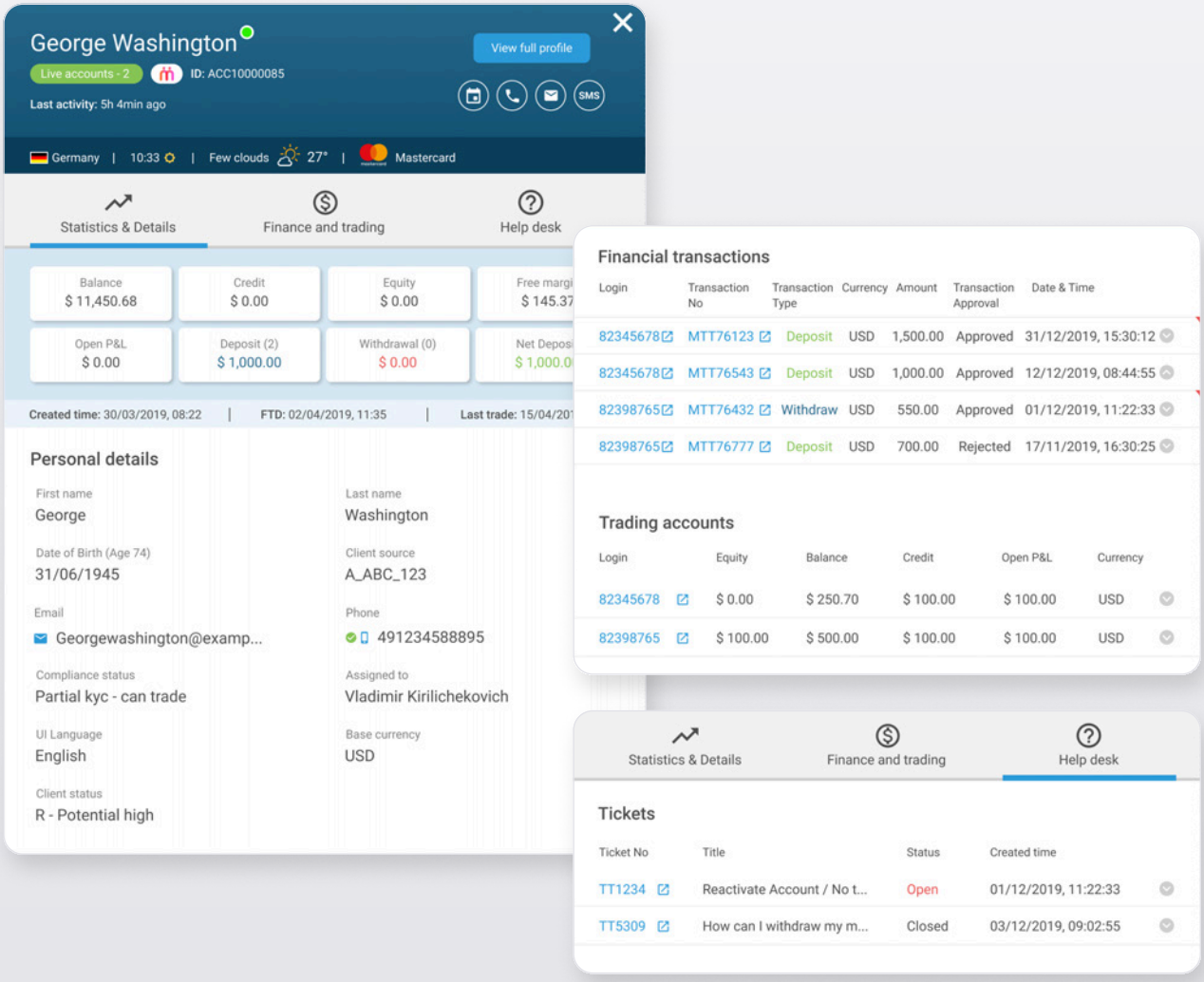
2006 Panda Trading Systems founded in Haifa, Israel

Panda CRM

Panda CRM is a brokerage-native CRM purpose-built for retail and institutional FX firms — covering the full client lifecycle from lead intake and KYC through funding, retention, reporting, and compliance workflows.

Designed specifically for the operational realities of multi-desk, multi-jurisdiction brokerages, Panda CRM gives brokers one connected environment for sales, compliance, retention, operations, and client management.

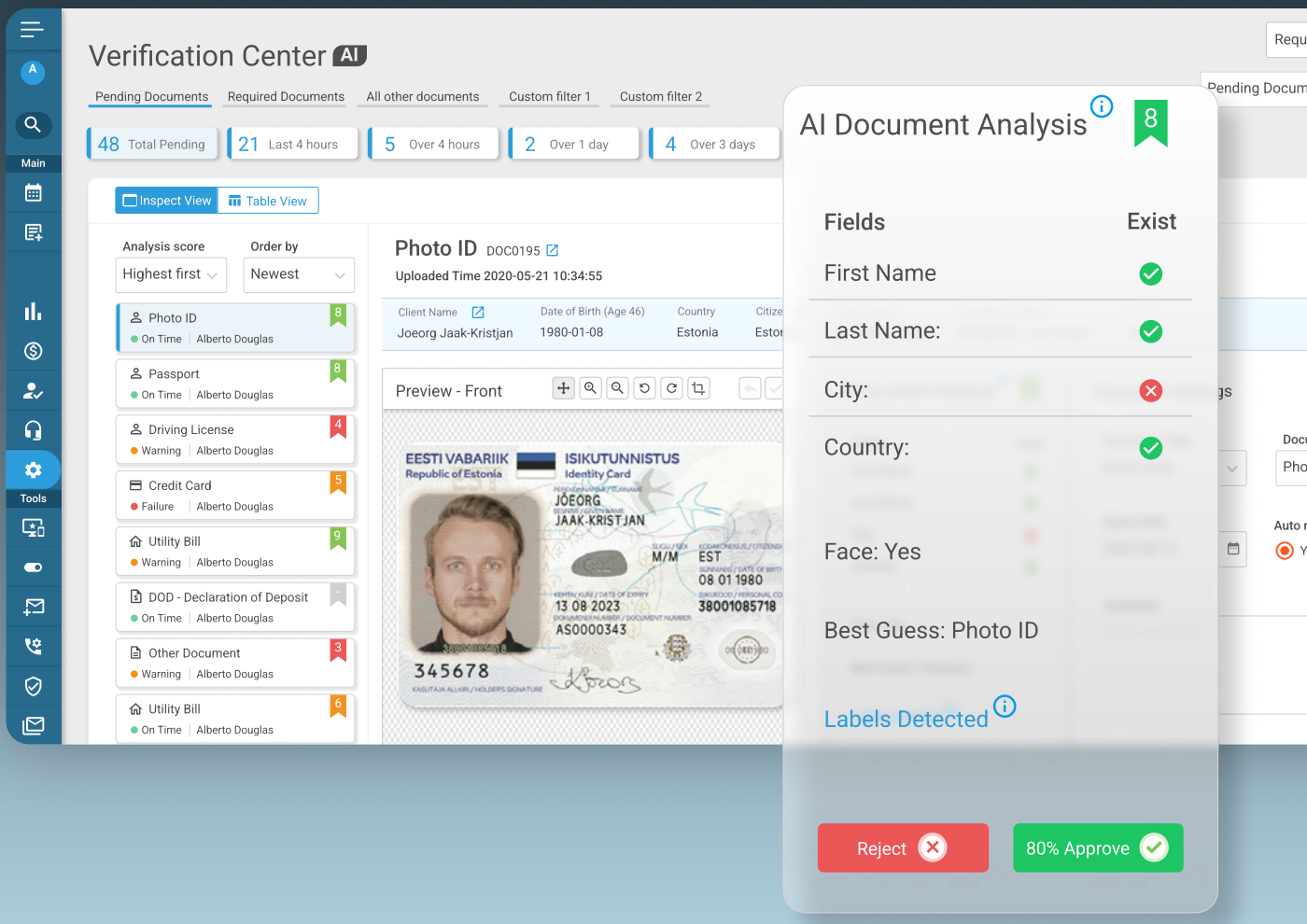
Unlike generic CRM platforms retrofitted for finance, Panda CRM was built from the ground up for brokerage operations — with real trading context, operational automation, and infrastructure designed specifically for forex and CFD firms.



Reduce client onboarding time by up to 60%

improve client retention, and expand your marketing reach

AI-assisted KYC, automated workflows, and native trading platform integrations help brokerages verify, onboard and manage clients more efficiently while maintaining compliance.



CRM Main Features

Automated Workflows

Manage the entire client lifecycle and take control of your operations with our automation engine designed to push your brokerage's efficiency to the next level.

Real-Time Notifications

Give your agents live alerts the moment a client's status or activity changes — so they respond in real time, not after the opportunity has passed.

Trading Server Integration

Full, real-time connection to your trading server — giving the CRM live insight into every client's trading activity, and letting your team manage accounts, deposits, and withdrawals without ever leaving the CRM.

Reports Module

Track registrations, volume, deposits, withdrawals, and FTDs in real time, plus full call analytics — transcripts, sentiment, and agent leaderboards — so you manage on facts, not guesswork.

Next Call AI

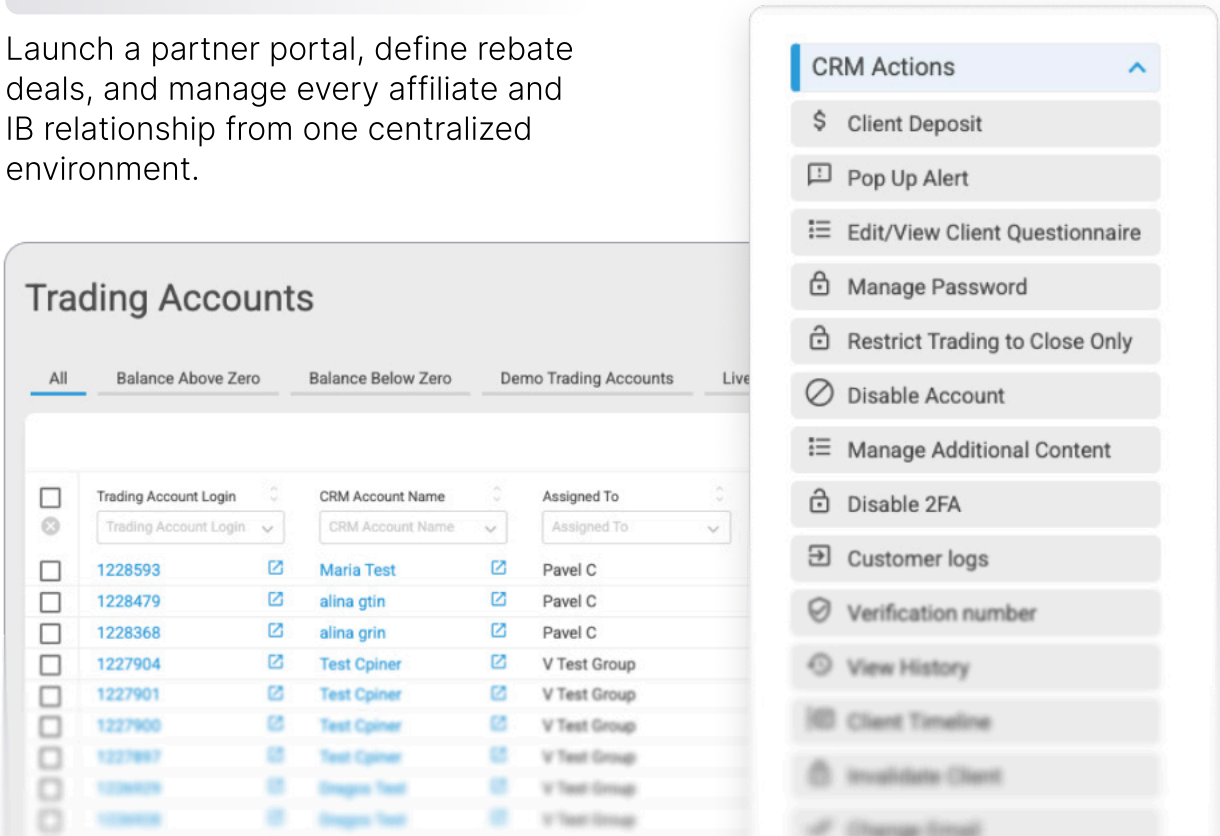
Know exactly who to call next. Our algorithm ranks every lead and client by likelihood to act, so your team spends time on the calls that convert.

Communication Module

Reach every client the way they want — call, email, SMS, WhatsApp, Telegram, or push — all from one place, with every conversation logged straight to their record.

Partner Management System

Launch a partner portal, define rebate deals, and manage every affiliate and IB relationship from one centralized environment.





Every module inside Panda CRM reflects the operational reality of running a brokerage **because that is exactly what it was designed to do.**

Client Area

One connected environment for onboarding, funding, support, affiliate activity, and client operations.

Paired with the Panda CRM, it gives brokers a unified front for client onboarding, account management, funding, and support. Both can be deployed independently of any other PandaTS product, and both are built to integrate cleanly with whatever trading platform a broker is already using.

The differentiators are practical: a modern interface, fast deployment timelines, and a roadmap shaped by an in-house team that works with brokerages every day.

Client Area Features

- Premium client experience
- Rich content for maximum client engagement
- Advanced analytical tools
- Integrations with premium services
- Custom Registration Flows
- Single Sign-On (SSO)
- Server agnostic Multi-Account Support

Key Advantages

- Retention-oriented features and UI
- Unified experience across all devices
- Translated in your client's native language
- Marketing and analytical integrations
- Multi-jurisdiction operational support
- Centralized onboarding and account management

Frequently Asked Questions

WHAT MAKES PANDA CRM DIFFERENT FROM OTHER FOREX CRMs?

Panda CRM is exclusively built for forex and CFD brokerages, with real-time trading data, AI-assisted KYC, and native integration with MT4, MT5, cTrader, and Panda Trader.

DOES PANDA CRM INCLUDE BACK OFFICE FUNCTIONALITY?

Yes. Panda CRM combines CRM and back office in one platform, including KYC, deposits, withdrawals, reporting, permissions, and audit logs.

HOW LONG DOES IT TAKE TO IMPLEMENT PANDA CRM?

Implementation depends on your requirements and integrations.
Most brokerages go live within weeks.

IS THE APP CONNECTED TO THE CRM AND CLIENT AREA?

Yes. It integrates with Panda CRM and Client Area for unified operations.

WHICH TRADING PLATFORMS DOES PANDA CRM INTEGRATE WITH?

Panda CRM integrates with MT4, MT5, cTrader, and Panda Trader.

Explore Panda Ecosystem

One Platform. Every Solution.

Beyond Panda CRM, Panda Trading Systems provides the surrounding infrastructure brokers need to operate efficiently — including WebTrader environments, mobile applications, social trading infrastructure, IB management, and brokerage automation tools.

Additional Products

Panda Trader
Dedicated cloud-based trading server infrastructure built for brokerage operations.

Panda WebTrader
Fully branded browser-based trading platform designed for modern multi-device trading experiences.

Mobile Applications
Native iOS and Android brokerage applications connected directly to trading infrastructure.

COOMA Social Trading
Social trading ecosystem allowing brokers to offer copy trading and community-based investing experiences.

Panda Quote Engine (PQE)
High-performance pricing infrastructure for liquidity aggregation, spread management, and real-time market data delivery.

PAMM / MAM Solutions
Multi-account investment management infrastructure supporting professional money managers and allocation models.

Meta Dealing & Risk Plugins
Advanced brokerage plugins designed to optimize operational workflows, risk management, and MT4/MT5 environments.

IB & Affiliate Management
Complete partner infrastructure supporting multi-level commissions, referral tracking, and affiliate operations.



Operate your brokerage from one connected ecosystem built specifically for the operational reality of forex and CFD brokers.

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Panda TRADING SYSTEMS

Brokerage technology provider since 2006