AN ALLOCATOR PARTNERS WITH EXTERNAL MANAGERS WITH MULTI-ASSET, ALTERNATIVES, PRIVATE MARKETS FUNDS

USE CASES
- Manager Research, Portfolio Construction, Sustainable Investing, Operational Due Diligence Teams

USERS
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The CHALLENGE
The firm's inbound management, research, and monitoring process involved manually collecting documents and data from prospective managers. The files are received in different formats, and the research analysts need to transcribe information from the marketing pitch, PPMs, reports, and DDQs into an Excel spreadsheet.

Further, the ongoing monitoring process required sending periodic questionnaires to the fund managers to collect information on portfolio exposures, AUM, and track record information not readily available in databases. Additionally, there is a need to gather general business performance details.

THE INNOVATION IMPACT

- **100%** DATA CENTRALIZED ON A SINGLE PLATFORM
- **60%** REDUCTION IN ADMINISTRATIVE COSTS
- **50%** FASTER TIME TO DATA
This is a game changer for our external manager engagement!