

Transform. Optimize. Scale.

Operational Alpha Delivered

Crisil Integral IQ @ TSAM New York | October 9, 2025

Key challenges for asset managers



Low-fee environment



Rising cost-to-income ratio



Evolving investor demands

How we can help



Next-gen operating model
Process optimization and transformation



Domain-led approach
Tailored offerings and advisory



Scalable and agile solutions
Enhanced productivity and efficiency

How your peers have benefited



Ownership-driven project delivery



Significant direct cost savings



Cutting-edge solutions



Low partnership risk



Robust risk controls safeguarding data

Who we serve



Diversified asset managers



Alternative asset managers



Hedge funds



Insurance and pension funds

Credentials



25+ transformation projects executed



1,600+ subject matter experts



Fluency across multiple platforms



12,000+ companies evaluated



300,000+ quarterly recon breaks



10+ tech-enabled accelerators



150+ funds received RFP/DDQ support

About us



A company of S&P Global



25 years collaborating with asset managers



100+ asset managers partnered with



10 global delivery centers

What we offer



Investment research and portfolio management

- Portfolio coverage expansion and maintenance
- Portfolio monitoring and surveillance
- Idea generation
- Thematic and industry research
- Portfolio construction



Alternative investments

- Deal sourcing
- Operational and financial due diligence
- Post-deal portfolio monitoring
- Portfolio value creation



Asset servicing and operations

- Trade and position lifecycle
- Fund/shadow accounting
- Performance attribution
- Regulatory reporting
- Data operations
- Pricing and valuations



Fund finance

- Valuation marks
- Financial reporting
- Financial risk management and reporting
- Expense management
- Vendor management and monitoring



Sales and marketing

- RFP/RFI/DDQ support
- Marketing material production
- Digital marketing and web analytics
- Fund/market commentaries



Sustainability

- Frameworks and scorecards
- Due diligence
- Engagement support
- Data management



Risk and compliance

- Investment compliance and monitoring
- Investment risk management
- Enterprise risk management
- Regulatory compliance and monitoring
- Financial crime compliance



Data transformation

- Data management and governance
- Data architecture and integration
- Data analytics and reporting
- GenAI augmented services

GenAI integration to deliver client value



RFP Pulse
Tool for RFP/RFI/DDQ response



Recon AI
Reconciliation automation



Phoenix Extract
ML-driven financial data extraction platform



Research Assist
AI-automated company tear sheets



Illiquid valuation
Valuation of L3 assets



ESG Studio
ESG data extraction and analysis

Snapshot of our strategic partnerships with impact beyond cost savings

Client

US-based asset manager
(AUM ~\$500 billion)

Asia-domiciled global asset manager
(AUM ~\$250 billion)

Diversified global asset manager
(AUM ~\$800 billion)

Impact

~**65%** reduction in manual efforts via automation-led initiatives

Accelerated set-up of **global competency center**

1.75x increase in analyst coverage

~**70%** lower error rate, leading to increased efficiencies

70% reduction in onshore bandwidth for sustainability workflows

20-30% efficiencies through process automation



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