



CLIENT STORY

SUPPORTING GROWTH AMID COMPLEXITY

Global Investment Firm Transforms Operations and Diversifies Into Private Credit

Client profile

The client is a leading global investment management company headquartered in France. As a top 50 global collateralized loans (CLO) manager and loan investor, they manage complex asset portfolios and require robust, efficient operational solutions to support their growth and success.

The challenge

The client faced significant operational challenges due to the complexity of their investment strategies and the limitations of their existing systems. As traditional asset management firms increasingly find attractive opportunities and returns by diversifying into private and structured credit, they recognized the need to replace their current technology and improve efficiency to better focus on their investment activities.

The solution: Virtus for FIS® Buy Side Portfolio Manager and FIS Middle Office Services

After a thorough evaluation of potential outsourcing partners, the client selected FIS as a industry-leading solution provider with a proven track record and as the largest outsourcing provider for CLOs and loans.

Our approach included:

- A fully integrated Business Process as a Service (BPaaS) solution that combined best-in-class technology with expert operational support
- Collaborative strategy development to align our solution with the client's unique requirements and goals

- Consultative approach focused on understanding the client's needs and building trust
- Seamless coordination across internal FIS teams to deliver a cohesive, tailored solution

The results

By partnering with FIS, the client achieved significant operational improvements and strategic benefits, including:

- Streamlined processes and increased operational efficiency
- Improved data management and reporting capabilities
- More time and resources to focus on core investment activities and growth
- A scalable, flexible platform to support future expansion and evolving needs

Conclusion

By combining industry-leading technology with deep domain expertise, we help investment management and fund administration firms support growth, streamline operations, reduce risk and achieve their strategic goals. Contact us today to learn how we can transform your operations and help you stay ahead in a dynamic, competitive landscape.

Replace current technology, streamline processes, reduce operational risk and improve efficiency to better focus on investment activities.

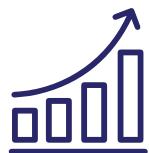
More time and resources to focus on core investment activities and growth, plus a scalable, flexible platform to support future expansion and evolving needs.

With FIS solutions, the client has been able to:

- Connect systems and processes for greater scalability and growth
- Automate inefficient manual workflows to decrease operational risk and costs
- Develop robust reporting and analytics capabilities to support decision-making
- Rely on a trusted partner with deep expertise in CLO and loan management



12%
asset increase
after conversion



150%
increase in
commercial loans

- Reduced operational risk
- Enhanced compliance

“**FIS has transformed the way we operate, enabling us to focus on what we do best – managing investments and delivering value to our clients. Their expertise, technology, and partnership have been invaluable in supporting our growth and success.**”

CEO

FIS Buy Side Portfolio Manager

FIND OUT MORE

FIS Middle Office Services

FIND OUT MORE

About FIS

FIS is a financial technology company providing solutions to financial institutions, businesses and developers. We unlock financial technology to the world across the money lifecycle underpinning the world's financial system. Our people are dedicated to advancing the way the world pays, banks and invests, by helping our clients to confidently run, grow and protect their businesses. Our expertise comes from decades of experience helping financial institutions and businesses of all sizes adapt to meet the needs of their customers by harnessing where reliability meets innovation in financial technology. Headquartered in Jacksonville, Florida, FIS is a member of the Fortune 500® and the Standard & Poor's 500® Index.



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