



Q&A Tipsheet: Buy Side Portfolio Management and Middle Office Services

Diversify investment strategy with technology innovation

Buy Side Portfolio Management for Diversified Strategies

How can FIS empower your portfolio management?

- Optimize decision-making: utilize advanced tools for trade order management to optimize your portfolio
 - Diversification: expand your investment options with complex scenarios
 - Efficiency: increase operational efficiency with automated workflows and centralized data
 - Scalability: scale your business effortlessly with an infrastructure designed for credit strategies
- Key features and benefits:

- FIS® Buy Side Portfolio Manager: empowers you to seamlessly integrate asset classes from varied data sources and diversify your portfolio with sophisticated investment options.
- Centralized data: centralizes portfolio data for a streamlined operational workflow.
- Automated workflows: facilitates the entire process from investment research to execution.
- Compliance assurance: ensures both pre- and post-trade compliance through rigorous testing

Middle Office Services for Credit and CLOs

How can FIS Middle Office Services help your business?

- Cost-effective transactions: add new transactions without the need for extensive infrastructure upgrades
- Resource efficiency: expand your book of business without increasing staff, achieving true volume insensitivity
- Vendor management: simplify your operations by reducing the complexity of vendor relationships through outsourcing

Key features and benefits:

- Virtus from FIS® Middle Office Services: offers a scalable operating platform that facilitates credit market access and growth.
- Client Portal: includes dashboards, standard/custom reports, alerts, and data feeds.
- Scalable Infrastructure: mature solution ensures quick onboarding and efficient ongoing services

LEVERAGE TOMORROW'S TECHNOLOGY, TODAY

Discover a multi-asset and credit portfolio management system

Explore how FIS can support your diversification convergence strategies with our portfolio management system. Designed for credit, hedge, and traditional managers, our system empowers you to:

- Add asset classes easily: integrate various asset classes from multiple data sources.
- Expand portfolios: utilize complex investment options while ensuring compliance.
- Streamline processes: centralize portfolio data and automate workflows for greater efficiency.

By understanding and leveraging these powerful solutions, you can optimize your portfolio management, streamline operations, and ensure the complexity of credit investments are reduced—all while scaling your business efficiently.

Engage FIS today to take your investment strategies to the next level. Visit our website to contact us for further information or to arrange a demo. www.fisglobal.com

