

INVESTMENT OPERATION SIMPLIFIED.

WITH ROBOTICS AND MACHINE LEARNING, ARE WE FOCUSED ON THE WRONG THINGS?

The shininess of emerging technology is undeniable. We're drawn to discover what is new, so it's no surprise that we see excitement among asset managers when it comes to the current wave of innovative technologies, including robotics, machine learning and artificial intelligence.



But, are we focusing on the wrong thing here?

The exciting part of emerging technologies is less about the technological "new factor" and more about how these applications can simplify complex or inefficient operational tasks in ways we've only imagined before.

LET'S CONSIDER A FEW KEY ACTIVITIES HAPPENING IN THE ASSET MANAGEMENT OPERATIONS ENVIRONMENT.

When we look at how these activities were conducted yesterday, and how they can be accomplished differently today, it's clear where the real excitement lies in using emerging technologies to maximize efficiency.



Reconciliation professionals used to have to spend a tremendous amount of time initiating match rules and sorting through false breaks that have been flagged as exceptions.



With machine learning-and RPA-enabled reconciliation systems that can "learn" exception and false-break patterns, **you can unlock significant efficiency and productivity gains.**

Even for passive funds, portfolio managers need to spend considerable time and resources on risk modeling and portfolio rebalancing.



When you add machine learning capabilities to portfolio management systems, you can automate rebalancing tasks and get smart recommendations that could optimize your portfolio. The result? **You can dramatically increase efficiency and reduce trading costs.**

Striking a NAV has long been a tedious, manual daily process for investment accounting teams.



When you add robotics-powered fuel to your reporting, you are able to accelerate the process of building a NAV report. With automation simplifying the process, **you can achieve substantial daily time savings.**

In the private equity space, limited partners used to spend a lot of time and effort rounding up investment data across their portfolio of funds and marrying up the resulting data in a highly manual process.



By adding RPA, the systems handle the complex work for you, automating the collection and analysis of investment data. The real win? **You can expect efficiency gains upward of 70 percent.**

Innovation for innovation's sake? Not so fast. Emerging technologies get exciting when investment operations professionals can apply them in smart ways that

SIMPLIFY OPERATIONS, MAXIMIZE EFFICIENCY AND SUPPORT GROWTH.

How have you seen emerging technologies applied in exciting ways?

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