



# 4 key strategies to help investment managers gain a competitive edge

Unlock affordable, scalable technology to boost performance

Investment managers are navigating an increasingly complex landscape where traditional strategies no longer deliver the returns needed to thrive. Revenue growth has stagnated while fee pressures and regulatory costs continue to squeeze margins. The stark reality? Investment managers must generate alpha and consistently outperform benchmarks to attract investors and differentiate their firm. Technology is fundamentally reshaping how firms create client value and execute investment strategies, driving new approaches with digital transformation across public, alternative, and private asset classes.

## How can you position to not just survive but excel in this environment?

### 1. Adapt to evolving investment strategies

More firms are turning to alternative strategies to generate alpha. But staying competitive requires agility to quickly capitalize on market changes and emerging opportunities. A consolidated technology solution unlocks the real-time information you need for improved decision-making and streamlined operations that keep you ahead of the curve.

#### Why it matters:

- New opportunities increasingly lie in private markets, derivatives and diversified strategies.
- Overloaded, fragmented systems create inefficiencies and limit growth potential.



**Actionable tip:** Consider an institutional-grade, cross-asset platform that gives you the flexibility to embrace complex strategies, expand into new markets and scale seamlessly.

### 2. Leverage advanced digital technologies

Modern investment management generates massive amounts of data, making automation and real-time insights critical. Advanced technology tools that can process and analyze data efficiently allow you to make informed decisions and act faster, opening doors to opportunity.

#### Why it matters:

- Firms are now handling 5–10x more data per decision.
- Integrated systems with real-time analytics provide a competitive edge in fast-moving markets.



**Actionable tip:** Invest in cloud-based systems with AI functionalities for seamless analytics, reporting and operational efficiency.

### 3. Cut costs, protect margins

Amid shrinking margins, reducing inefficiencies in operations is essential. Yet many firms still rely on manual processes, outdated systems and in-house technology maintenance, which drive up operational costs, struggle with rising reporting demands and inhibit growth.

#### Why it matters:

- Human errors and inefficiencies cost firms millions annually.
- Consolidating platforms reduces overhead and simplifies operations.



**Actionable tip:** Smaller firms can scale for growth by transitioning to a single, SaaS-delivered automated platform for order management, portfolio construction and risk oversight to minimize costs, optimize staff time, and open cross-asset growth opportunities.

### 4. Strengthen risk and compliance management

Firms need a centralized, real-time view of portfolio risk positions if they are to navigate increasingly stringent regulations and complex risks. Siloed data spread across fragmented systems makes it difficult to balance immediate tactical trading, hedging or capital allocation decisions with long-term risk and compliance goals.

#### Why it matters:

- Scattered compliance data increases exposure to breaches and inefficiencies.
- Real-time risk management boosts transparency and improves decision-making.



**Actionable tip:** Deploy a holistic ecosystem with advanced tools for continuous position monitoring integrated with pre- and post-trade compliance capabilities. Ensure the tools provide clear risk analytics to guide strategy adjustments.

## Why technology is critical to future investment management success

- **Stay agile:** Institutional-grade technology empowers firms to take advantage of opportunities in different asset classes and markets, and scale operations to meet new complexities.
- **Drive insights:** Real-time capabilities unlock better decision-making power.
- **Enhance efficiency:** Automation cuts overhead and manual errors to improve profitability and institutional credibility with prospects.

Upgrading your technology isn't just an operational improvement; it's a strategic imperative for sustained growth and competitive differentiation.

## Unlock your potential

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Unlock liquidity and flow of funds by synchronizing transactions, payment systems, and financial networks without compromising speed or security.



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