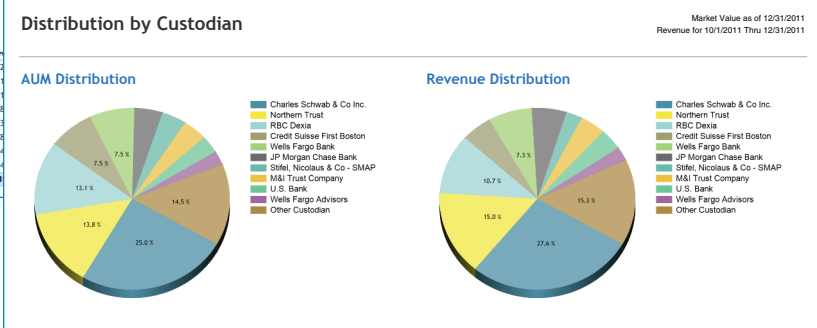
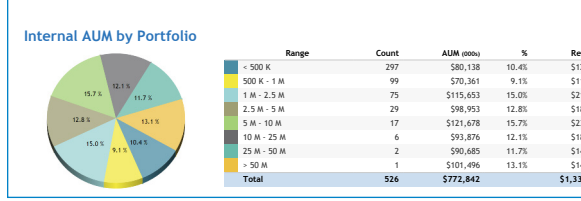
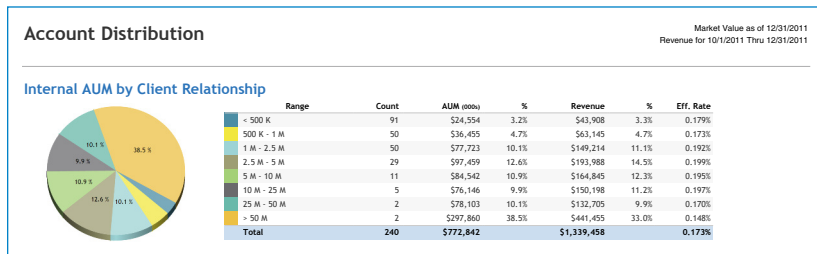


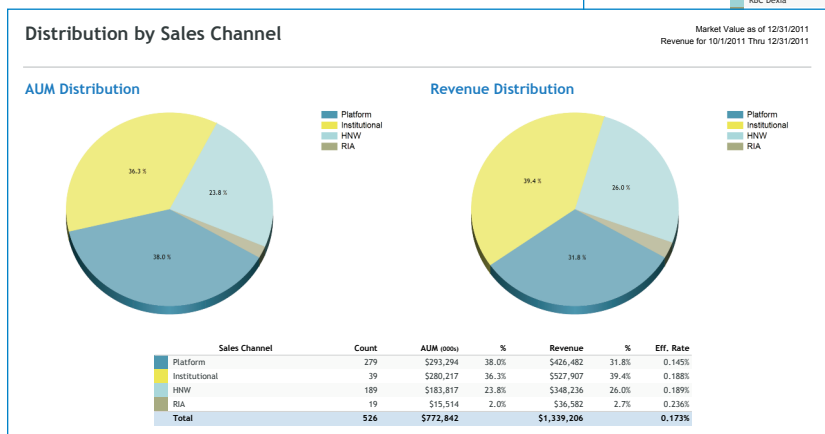
Business Intelligence (BI) report package

The Business Intelligence (BI) report package helps your front office quickly understand the overall health and direction of the firm. The reports reflect trends in account AUM, revenue and demographics delivered in a visual format that is easy to comprehend. These flexible BI reports are designed to be used by

Operations to discover trends, by Marketing to find potential new prospect pipelines and by Management to measure corporate health. The BI reports can also be used to extract and compile data from multiple reports.



View your business distribution by Contact or Portfolio Characteristics with the Account.



Break down revenue and AUM by custodian using the Distribution by Custodian Report.

Identify market value composition using the Distribution by Sales Channel Report.

Key features

- View your business distribution by Contact or Portfolio Characteristics with the Account.
- Identify market value composition using the Distribution by Sales Channel Report.
- Break down revenue and AUM by custodian using the Distribution by Custodian Report.

Other features include:

- Manage user preferences with a built-in Management Console
- View your business by Relationship or Account Size and organize data by AUM or Revenue ranges
- Customize your “Smart Reports” to display the desired detail without the use of custom labels
- Ability to view data “as it was” for a point in history
- Compatible with APX 4.1 and later

Who we are

SS&C Advent is a business unit of SS&C Technologies that is helping more than 4,000 financial services firms around the world from established global institutions to small start-up practices. Delivering precision and ahead-of-the-curve solutions for more than 30 years, we help our clients minimize risk, work together seamlessly, and shape the future of investment management.

For more information, visit www.advent.com.

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