

### Profile

**Client:** Mont Pelerin Capital

**Description:** Manager of a diversified long/short equities hedge fund focused on growth

### Background

- › Fund launched in 2005
- › Firm initially stored research data, models and notes on a shared drive and exchanged information via email
- › Needed a more efficient way for the investment team to view, disseminate and share both real-time and historical information

### Solution

Advent Tamale RMS®

- › Centralized repository for all research and due diligence data a firm receives and generates
- › Makes information accessible to all members of the investment team

**“Tamale is a core piece of technology utilized by the entire firm. Of all the applications we use, I would say Tamale is the top application that’s touched by the entire firm every single day.”**

**Michael Cancelleri, Senior Vice President and Portfolio Manager, Mont Pelerin Capital**

### Tamale Drives More Effective Collaboration at Mont Pelerin Capital

Named for the fabled Swiss birthplace of market-driven economic theory, Mont Pelerin Capital pursues a long/short equity strategy with broad diversification among sectors and market cap sizes. In a rapidly changing market, the firm needs the ability to capture the most current information and share it among the five-member investment team.

“When we launched the fund, we were using a common shared-drive where we created and shared files,” recalls Michael Cancelleri, Senior Vice President and Portfolio Manager. “All the ongoing news, financial models, anything pertinent to the companies we tracked, we just saved in Word documents. We would shoot emails and attachments back and forth. It was just an archaic, inefficient way of disseminating the information we needed to make better investment decisions.”

### Reshaping the Investment Process

The firm compared a few of the research management systems available in the market, and selected Advent’s Tamale RMS®. Tamale provides a centralized repository for all the firm’s research, whether in the form of email, meeting notes, presentations or items off the web, and makes it available to the entire team.

“Tamale has completely changed the way that we manage our entire investment process,” Mr. Cancelleri says. “Because we are all on a common platform that enables open communication to occur, it allows for more fluid dialogue about the investments we’re making. We live in a world where

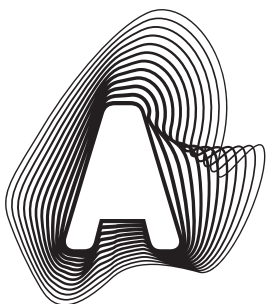
investment decisions and pricing change every second. So the more fluid we can make the process, the better.”

Between Tamale and the shared-drive approach, “There’s no comparison. Previously, when we needed to make a decision, we would have to go back through many individual documents and revisit the news and notes and financial models around the investment. Usually it was all captured in one person’s mind or on one computer. Now when we get everybody in a room together, we don’t have to start from the beginning. There is a progressive conversation that has taken place through Tamale, and therefore we can make a decision much more quickly and move forward.”

### Preserving Institutional Memory

Mr. Cancelleri cites three key benefits that Mont Pelerin Capital has realized with Tamale:

- › **Visibility of information.** “There are four people at any one time tracking 25 to 200 different investment opportunities. Tamale provides a dashboard into their thinking as well as pertinent news items related to those opportunities.”
- › **Historical tracking.** “Tamale allows us to go back and look at the chain of events or news items around a particular investment. It provides some historical perspective and gives us a chronological timeline to bring people up to speed.”
- › **Retention of knowledge.** “In many cases when people leave, a lot of knowledge leaves with them. Either it’s just in their heads or we’ve not had an effective way of capturing that information. Now, regardless of someone leaving, we’ve got



## Client Story

### Benefits

- › Enables ongoing dialogue about investment opportunities among the investment team
- › Provides a historical perspective on previous investments and trading decisions
- › Retains firm's institutional memory as employees leave and new ones arrive
- › Allows for selective viewing of information using email notifications

**"Tamale has completely changed the way that we manage our entire investment process."**

a repository where all of that knowledge can always stay within Mont Pelerin Capital, and it's accessible for everybody in the firm."

Another benefit is the ability to filter information and designate recipients. "We don't want to inundate the chief investment officer with unnecessary information," says Mr. Cancelleri. "We also use Tamale for email notification based on priority levels to notify him by email when there's something pertinent he needs to see."

### A Must-Have Application

Mr. Cancelleri sums up the role Tamale plays at Mont Pelerin: "Tamale is a core piece of technology utilized by the entire firm. Of all the applications we use, I would say Tamale is the top application that's touched by the entire firm every single day. It's incredibly valuable for us."

### Join the Conversation



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