

Profile

Client: Signature Global Asset Management, a division of CI Investments Inc.

Location: Toronto

Description: Global Asset Manager with mix of retail mutual funds and institutional assets

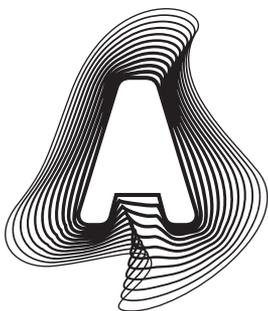
AUM: CI Investments \$81 billion, of which \$40 billion is managed by Signature Global Asset Management

Background

- › Signature's investment philosophy relies on in-depth market knowledge
- › The group faced a rapidly growing volume of research data to process
- › With generic file-sharing, information was difficult to capture and retrieve
- › Information was not easily disseminated within the investment team

Solution

Advent's Tamale RMS® Research Management Solution



“We are in a very competitive industry where gathering, processing and having quick access to information can be a big differentiator. Tamale gives us a powerful advantage.”

The Challenge: To Spend Less Time Processing Research, More Time Applying It

As an important part of Canada's third-largest investment management firm, Signature Global Asset Management appreciates the value of market intelligence. The group relies heavily on bottom-up sector research combined with a keen understanding of macroeconomic trends. And because of the increased interconnectivity among the world's capital markets, collaboration across the entire investment team is critical.

Like many firms, Signature Global Asset Management found itself processing an escalating volume of research data every day—slide presentations, meeting notes, news releases, broker reports, voice mail and more. “Creating hierarchical filing systems and saving electronic documents was becoming increasingly cumbersome,” recalls Joe D'Angelo, Vice President and Portfolio Manager. “Retrieving documents we had already processed was becoming more difficult. Information was collecting in silos, and dissemination was ad hoc.”

The Solution

In 2012, the firm went shopping for a research management solution specifically designed to support the investment process. “We needed to be able to summarize the most pertinent information and archive it quickly for future reference,” Joe says. “We also needed to reduce some of the silos that were creeping up, and allow for better collaboration.”

After comparing the systems on the market, Signature Global Asset Management chose

Advent's Tamale RMS. “The Tamale interface looked better to us,” says Joe, “and we liked the fact that it's backed by a solid company like Advent. The commitment to customer service was very impressive.”

Point-and-Click Easy

Tamale provides a central repository for collecting, storing and sharing research data in any form, archived by ticker symbol, sector or topic for easy retrieval. A simple mouse click is all it takes to capture a PDF, Microsoft Word doc, spreadsheet, Power-Point or email. “It's very easy to use and quick to deposit items,” says Joe. “The retrieval process is much better than what we had before.”

Collaboration and Competitive Advantage

With Tamale, investment teams can make more effective use of their collective intelligence. They spend less time managing and searching for information and more time deliberating investment ideas. “Having Tamale fosters more collaboration among team members,” Joe observes. “It instills a more disciplined process in the organization and how we approach our decisions.”

Tamale also supports Signature Global Asset Management's marketing initiatives. “We are in a very competitive industry where gathering, processing and having access to information can be a big differentiator,” Joe notes. “Tamale gives us a powerful advantage.”

Research also represents a substantial cost for most firms—one they must be prepared to bear if they are to compete in an increas-

Client Story

Benefits

- › Centralizes all research data on one system
- › Makes information easy to capture, archive, retrieve and share
- › Fosters collaboration within teams
- › Instills a more disciplined investment process
- › Delivers competitive advantage with rapid access to actionable information

“Having Tamale fosters more collaboration among team members. It instills a more disciplined process in the organization.”

“The implementation went very well. Advent worked one-on-one with each team member. We got up to speed quickly on the system.”

ingly complex marketplace. Tamale helps Signature Global Asset Management derive more value from its research investment. “Between broker commissions, hard dollars and travel budgets, we spend a significant amount of money getting access to information as quickly as possible,” explains Joe. “The better we are able to process and archive that information in Tamale for future access, the more effectively we can put it to use.”

Client Support: “10 Out Of 10”

Advent helped the firm get started with Tamale. “The implementation went very well,” Joe reports. “Advent worked one-on-one with each team member. We got up to speed quickly on the basics of the system. It is very easy to use with a short learning curve. And customer support is always there to answer questions in real time.”

Overall, for training, service and support, Joe says, “Our experience with Advent has been excellent—a 10 out of 10.”

The Purpose-Built Advantage

Some firms have tried to work around the deluge of research data using combinations of email folders, desktop search and shared drives, or relying on note-taking, web-clipping software and online file sharing designed for consumer use. For operational and analytical efficiency, however, there is no substitute for a system like Tamale designed specifically for the way investment managers work.

“The volume of information being processed will only continue to grow,” Joe says. “The sooner you set up Tamale, the sooner you will be able to build a powerful archive of information that can be used for whatever the need may be in the future.”

About Advent

Over the last 30 years of industry change, our core mission to help our clients focus on their unique strategies and deliver exceptional investor service has never wavered. With unparalleled precision and ahead-of-the-curve solutions, we’ve helped over 4,500 firms in over 60 countries—from established global institutions to small start-up practices—to grow their business and thrive. Advent technology helps firms minimize risk, work together seamlessly, and discover new opportunities in a constantly evolving world. Together with our clients, we are shaping the future of investment management. For more information on Advent products visit www.advent.com.

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