

Tamale RMS® for Asset Managers

# Optimize the Value of Research to Improve Due Diligence and Decision Making

Thorough research and rigorous due diligence are crucial to making timely and informed investment decisions. Yet buy-side firms are inundated with research data. It comes from many sources, takes many forms and often resides in many places, making it extremely difficult to organize, search and find critical information. As a result, investment teams may not be applying their collective knowledge as effectively as possible in idea generation, deliberations, and decisions.

## The Solution: Tamale RMS

Tamale RMS is the research management solution purpose-built by and for investment professionals. It provides a centralized repository for organizing all research data, both internal and external, in

one place—making it easy to access, search, find and share information, and use it to its greatest effect.

## Make Faster, Better-Informed Decisions

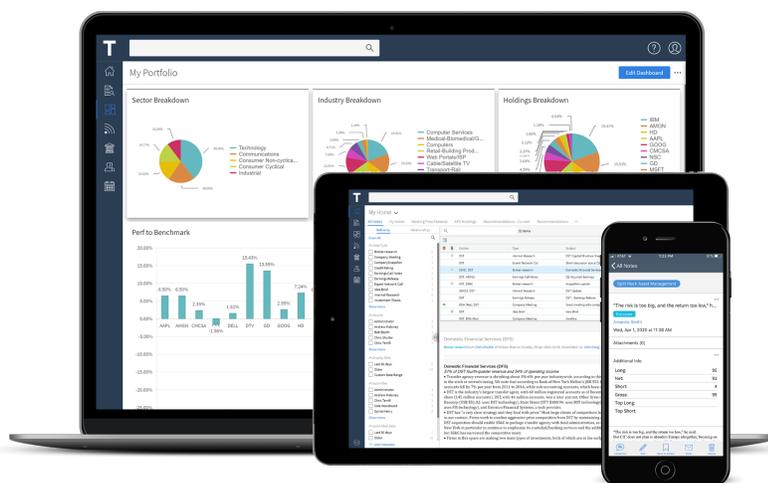
As the investment industry becomes increasingly data driven, the ability to strengthen and streamline the research process is no longer a luxury. It's a competitive necessity—and a competitive advantage.

Moreover, firms need to document the rationale for their investment decisions for compliance. And clients and prospects doing their own due diligence want to know you have a disciplined, transparent decision-making process.

## It's in Tamale.

Institutional investors use Tamale to capture virtually every piece of information related to their investment research process, including:

- Company reports
- Analyst commentary
- Price targets
- Earnings analysis
- Proprietary research
- Broker research
- Investment theses
- Idea pipeline
- Due diligence
- Meeting notes
- External correspondence
- Relevant news



**Improve decision-making efficiency and quality:** With Tamale, investment teams strengthens team collaboration by getting everyone working from the same knowledge base. And Tamale accelerates the process from idea to decision, enabling teams to deliberate more opportunities in less time, thereby improving the productivity of your firm's highest-value employees—the front office.

**Gain an edge in the market:** Knowledge is your firm's competitive edge. By bringing structure to research data, Tamale makes it easier to connect the dots quickly, sharpen your insights, and enrich the decision-making process. Avoid missed opportunities or acting too late due to a lack of information or insight.

**Show smart thinking:** Tamale helps differentiate your business with clients and prospects by demonstrating a disciplined investment process. It can also serve as your system of record, documenting the reasons for investment decisions for compliance purposes.

**Improve knowledge transfer:** Subscribe to notifications based upon any criteria—topic, watchlist, submitter, type of data.

## What Makes Tamale Different and Better

**Purpose-built:** Unlike generic note-taking, web-clipping, or online storage solutions, Tamale RMS is the research management solution built by and for investment professionals. It allows users to seamlessly capture, upload, and index data from virtually any source: email, internet search engines, PDFs, Microsoft Office® documents. It is highly configurable and adaptable to the way you work.

**Mobility:** Cloud delivery and mobile applications make Tamale accessible anytime, anywhere, enabling teams in disparate locations to collaborate in real time. Take Tamale on the road, prepare for client meetings on the fly, and have instant answers at your fingertips.

**Scalability:** Tamale can adapt to firms and investment teams of any size, from as few as two users to as many as 300 or more.

## Backed by the Strength of SS&C Advent

Tamale is backed by a global support team and dedicated RMS experts. We can help you take full advantage of the system's capabilities and use it most effectively. Our professional implementation services get you up and running quickly, so you can start seeing value from day one.

In a fast-moving market, firms that optimize their research through technology will be better prepared to seize opportunities and improve their chances of success. That is why hundreds of firms and thousands of investment professionals rely on Tamale RMS to help bring order to the research process, streamline workflow, and make smarter decisions.

## About SS&C Advent

SS&C Advent helps over 4,300 investment firms in more than 50 countries—from established global institutions to small start-up practices—to grow their businesses, minimize risk, and thrive. We have been delivering unparalleled precision and ahead-of-the-curve solutions for more than 30 years, working together with our clients to help shape the future of investment management.

Find out how you can take advantage of our industry-leading solutions to support your business goals. To learn more about the right solutions and services for you, contact [advent@sscinc.com](mailto:advent@sscinc.com).

For more information contact your SS&C Advent representative or email [sales@advent.com](mailto:sales@advent.com).

## Key Features and Benefits at a Glance

<b>Automated email captures and tagging</b>	Save time, relieve an administrative burden, and never miss important information
<b>Flexible indexing and search options</b>	Organize and find data by company, sector, investment theme or any criteria you designate
<b>Powerful filtering capabilities</b>	Improve search speed and precision of results
<b>Full mobile access</b>	Work and collaborate remotely, and prepare for meetings on the fly
<b>Email digests and push alerts</b>	Get the right information to the right people at the right time
<b>Intuitive user experience</b>	Learn Tamale in a single session and make a fast leap from training to using

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