

Tamale RMS® for Asset Owners

Strengthen Manager Due Diligence and Performance Tracking to Reduce Risk and Improve Results

For institutional investors, selection of external portfolio or fund managers entails exhaustive due diligence, data collection and analysis. Without a system or a structure, key information could get lost in the shuffle, and it's harder to make informed decisions. Once you have engaged managers, you need to continue to monitor and review their performance, investment decisions and adherence to strategies. Tracking managers with reliable data is critical to risk management. What's more, asset owners have to account for manager selection and performance to investment committees or oversight boards. You need to have the data to back your decisions well organized and readily available.

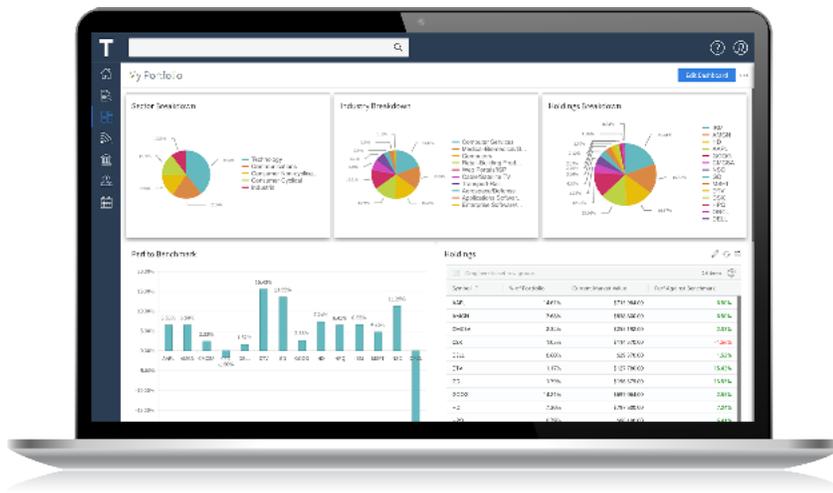
The Solution: Tamale RMS

SS&C Advent's Tamale RMS supports a disciplined, structured approach to manager research, due diligence, selection, ongoing tracking, and performance reviews. Tamale provides a centralized repository for organizing data on managers and making it easily accessible to the due diligence team. You have total transparency into each manager's activity and can make informed allocation decisions, both pre- and post-investment.

It's in Tamale.

Institutional investors use Tamale to track virtually every piece of information related to their manager selections and ongoing monitoring, including:

- Manager Profiles
- Manager Ratings
- Form PF/disclosures
- Strategies
- Performance
- Due Diligence
- Regulatory Enforcement Actions
- Meeting Notes
- Manager Correspondence



Improve Decision-Making Efficiency and Quality

With Tamale, you spend less time searching for and organizing manager data, so you have more time for vetting candidates, deliberating decisions, and tracking and analyzing results. Tamale empowers the due diligence team and decision makers to collaborate more effectively by getting everyone working from the same base of knowledge.

Key Features and Benefits at a Glance

Customizable manager tracking template	Easily track current and prospective manager
Automated email capture and tagging	Save time, reduce an administrative burden, and never miss important information
Flexible indexing and search options	Organize and find data by manager, allocations, fund type, strategy or any criteria you designate
Powerful filtering capabilities	Improve search speed and precision of results
Full mobile access	Work and collaborate remotely, and prepare for meetings on the fly
Email digests and push alerts	Get the right information to the right people at the right time
Intuitive user experience	Learn Tamale in a single session and make a fast leap from training to using

Reduce risks: Conduct more rigorous, thorough, and effective due diligence with greater transparency and ensure that managers' strategies are aligned with your objectives.

Make decisions with confidence: Tamale enables you to track a broader universe of current and prospective managers in less time, accelerating the due diligence and performance review process without compromising quality.

Document your decisions: Tamale can serve as your system of record for manager selection and reviews for compliance purposes as well as for reporting to the investment committee.

Improve knowledge transfer: As new colleagues come onboard, Tamale makes it easier to bring them up to speed on external manager activity.

What Make 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.

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 manager meetings on the fly, and have the data you need at your fingertips.

Flexibility: Tamale is highly configurable and can be easily adapted to your due diligence process and workflows.

Backed by the Strength of SS&C Advent

Tamale is backed by a global support team and dedicated research management 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, institutional investors that optimize their due diligence process through technology can dramatically reduce their risks, with total transparency into their manager allocations and activity. That is why growing numbers of asset owners rely on Tamale RMS to bring structure to due diligence, streamline workflows, and enrich the decision-making process.

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.

For more information contact your SS&C Advent representative or email sales@advent.com.

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