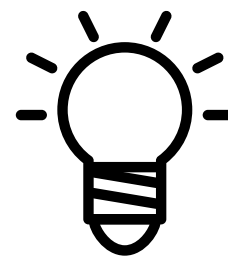


CASE STUDY



The Challenge

Our client, a small boutique asset manager based in Belgium distributing funds mainly in Benelux, was looking to streamline their data and document dissemination process, both to their website and to downstream venues.

They identified that the cost associated with the internalisation of this process would be significant to their business and would prevent them from deploying their internal marketing and IT resources to higher value activities.

Return on Investment

- Streamlined integration
- Significant cost savings VS options: internalisation or external web-only development
- Immediate and simplified onboarding of data
- Fundsquare ecosystem/data hub advantage: oversight control on data points
- Kurtosys full-suite capacities: automation of client marketing collateral, ESG-focused reporting portals.

The Solution

Fundsquare was able to provide a turnkey solution to data dissemination collection and quality verification.

The onboarding required the client to only transmit one copy of their data to Fundsquare directly.

A number of core data points and regulatory materials were already ready for dissemination and consumption as Fundsquare's established platform is at the heart of the fund community.

Additional data points were quickly onboarded and made ready for immediate push to the downstream consumers.

Kurtosys configured a fully branded digital fund center.

As well as surfacing regulatory data points and documents, the fund center was able to automatically display the correct products according to the client's registered-for-sale matrix.

This could then be embedded using a simple HTML snippet into their existing website for use by their own investors and advisors.