

case study

ARCHER'S SOLUTION FOR LAUNCHING SMAs

Archer works with a variety of asset managers, from large global managers to emerging boutique managers, to help them streamline operations and scale. Here's how we helped a global institutional asset manager enter the SMA marketplace.

the challenge

A global institutional asset manager was experiencing increased demand for new strategies in a variety of structures from their distribution partners. Their sales team felt that expanding their product offering would be key to growing the business. The firm wanted to expand its brand and grow across intermediary channels with single and dual contract accounts as well as model delivery.

In addition to requiring operations support, they needed to increase their understanding of market drivers and develop a go to market strategy.

archer's solution

Before beginning to build the products, Archer worked with the firm to build a business case to gain internal support for the expansion into a new market. Once approved, Archer provided the technology enabled services to complement their growth trajectory, including a full integration with all the firm's counterparties and internal reporting systems.

Launching the SMA strategies resulted in 2,000 accounts with \$850 million in AUM within the first 36 months, and these strategies now bring in \$3.4 million in revenue annually.

For more case studies, white papers, overviews, and videos on Archer's solutions, please visit the Resources section of

archerims.com