



Best outsourcing provider to the buy side

Archer

Noted for its ability to help asset managers swiftly launch new products and enter new distribution channels while demonstrating a quick ROI, Archer has been named the best outsourcing provider to the buy side in this year's BST Awards.

The platform offers straight-through processing across the entire investment management operations continuum, the length of which runs investment accounting, securities valuation, composite management, order management, securities settlement, billing, and client reporting. This reduces risk, ensures data integrity and security, increases efficiency, and enables speed to market with new products, distribution channels, and strategies, says Matthew Caulfield, Archer's executive vice president.

In one example of a client success story, a "highly-respected" investment team spun off from a global asset manager, bringing their proprietary approach to dividend growth investing. With only two portfolio managers and an analyst, the firm required immediate infrastructure to take advantage of opportunities to distribute their strategies across the industry. Their Archer infrastructure was up and running—and their strategy efficiently distributed across three sponsors—within three months.

In the last year, the Pennsylvania-based services provider has accelerated product expansion to support customized portfolios focused on ESG, customer level restrictions, and tax optimized strategies at scale, Caulfield says. At the same time, the firm has begun deploying machine learning to predict service agent actions, speed request processing, and automatically generate workflow tracking for task and document management.

Caulfield says that, in the future, the company will look to broaden its capabilities to support customized portfolios at scale for direct indexing and tax-optimized investment strategies, expanding its offering with a complementary investor portal solution, and tap more deeply into the Canadian marketplace.

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