

SOLUTIONS FOR GROWTH: SUPPORT INSTITUTIONAL INVESTORS



When it comes to complex portfolios, responsiveness and accuracy are key. Archer provides consultative support and fully scalable cloud technology to keep your team focused on investments – and clients. Our solution integrates with custodians, administrators, and brokers for efficient trade flows, multi-currency processing, and exacting reconciliation. Customized reporting and aggregate performance data are readably available. From processing corporate actions to ensuring compliance with investment policies, Archer streamlines every aspect of institutional portfolio management. And with comprehensive capabilities for model delivery and sponsor platform participation, Archer fuels your team's growth into new distribution channels.

THE CHALLENGE

An institutional asset manager was growing through acquisition, with newly integrated teams using multiple, disparate systems to support their accounts, each with their own unique operational processes. Multiple team locations, sophisticated investments, and differing customized reporting added to growing operational complexity, reducing the ROI on new acquisitions.

THE SOLUTION

Working with the asset manager, Archer developed processes that integrated preferred OMS/EMS vendors with a single investment book of records to greatly simplify operations without sacrificing flexibility. With one system supporting all assets and locations, portfolio accounting, performance measurement, billing, and reporting were greatly streamlined. Operational support was also customized and centralized to provide a strong foundation for growing the business. As a result, new acquisitions were able to be added more quickly, improving the ROI. Consistent support and firm-wide views across mutual funds, ETF holdings, and separate accounts improved compliance and firm-level reporting.