



CASE STUDY

Asset Owner

Implements modern RMS to get a single, secure view of internal and external managers

Picture this... you're a \$100 billion pension fund using a diverse mix of public market, private market, and multi-asset strategies.

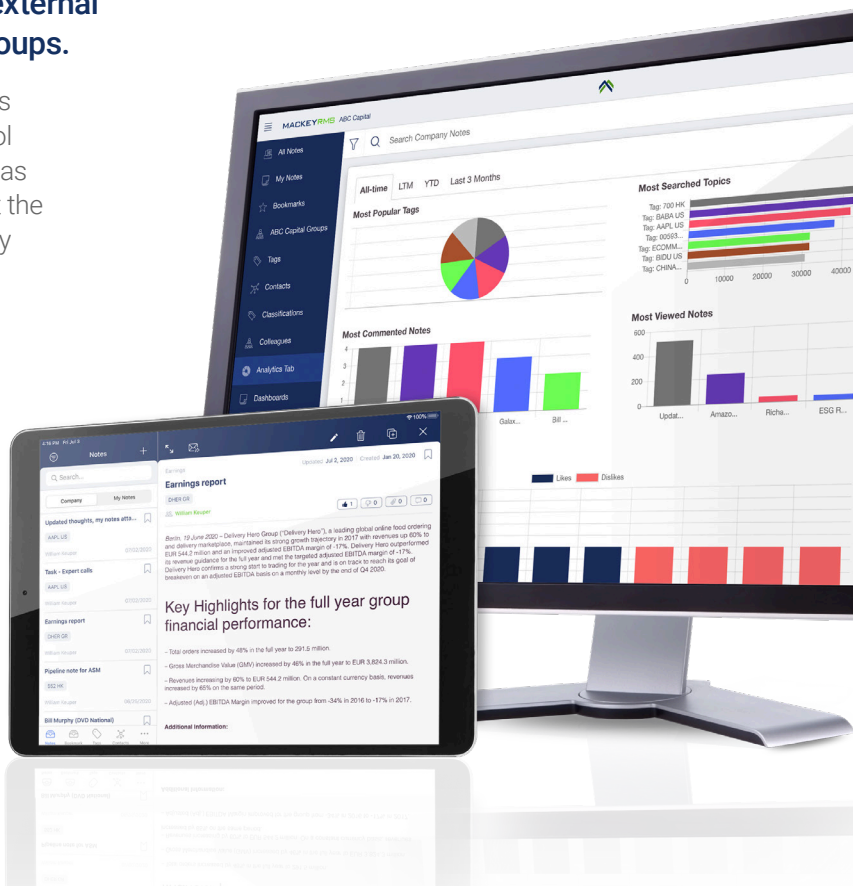
You've recently completed a multi-year initiative to redesign your operating and data governance model after shifting the majority of your assets from external managers to internal portfolio management groups.

But the research management system your organization is using doesn't provide the visibility, customization or control you need. Your current system stores your research and has some basic cataloging features, but it isn't able to support the custom dashboards, templates, and workflows required by your individual teams.

Your system also doesn't let you assign access permissions on a user and team basis, which raises privacy concerns across the organization. So now only 10 percent of your team is using the platform, and you know this won't work long term.

So, you turn to Mackey

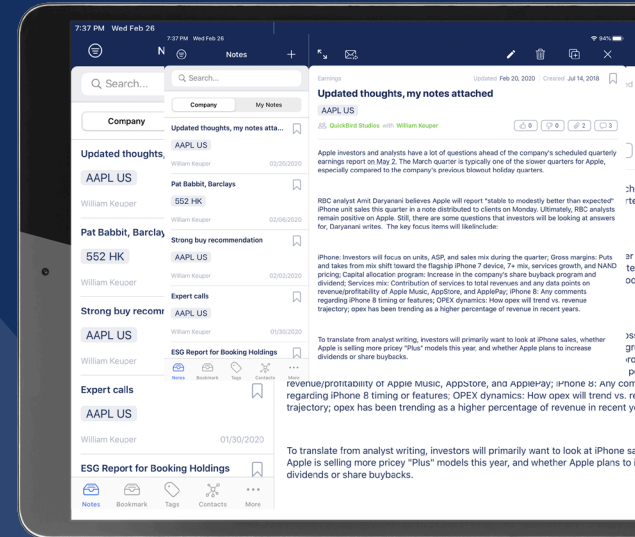
We develop a data migration plan to get all your firm's internal and external research into a single, SaaS-based platform to ensure you get real-time access to all your research content. We also ensure the system gives you individual tear sheets for tracking individual securities and external managers, and we help you build custom workflows to support the unique needs of your internal public, private and credit market teams.



Now, you have a single, modern research management platform that's flexible enough to support all of your organization's unique workflow requirements.

Your new RMS also allows you to assign access privileges at both the individual and team level, so your teams are now all working within the same platform and no longer concerned about privacy issues.

Plus, that same system tracks all your external manager engagement and performance. Finally, you have 100% control over your investment story. That's what happens when you **do more of what works**.



Want to learn more? Contact us today at info@mackeycorp.com

About MackeyRMS

MackeyRMS is a provider of SaaS-delivered research management software engineered to optimize the way analysts and portfolio managers generate, share, debate and act on investment research conducted for actively managed portfolios. Relied upon as a single system of record for research supporting the investment process, Mackey is used by many of the world's leading investment managers to organize key investment workflows, engender trust from investors, and streamline regulatory and compliance oversight. Mackey is used by institutional asset managers and asset owners across the Americas, EMEA and APAC regions.