

KURTOSYS

Real growth. Realized.



Kurtosys in Brief

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Kurtosys is used by over 80 of the world's largest asset and wealth managers to drive AUM growth, retain clients, and build their brands. Specifically designed for the needs of asset managers and distributors, Kurtosys fulfils five key needs across the spectrum of sales, marketing, and client service:

1. **Digital Experience Management:** The creation of cutting-edge brand experiences for web and mobile, combining state of the art visual content authoring with industry leading security and compliance features.
2. **Fund and Investor Data Visualization:** From fund centres to document libraries, and from interactive performance charts to comparison tools; Kurtosys provides a vast library of components that can be configured and embedded in sites and portals with zero coding.
3. **Document Automation:** Automatic production of critical sales and client reporting material. Accurate, beautiful documents, delivered rapidly to your sales teams, partners, and investors.
4. **Sales Enablement:** A single source of truth for every document, data point, and piece of content, all at the fingertips of your sales team and complemented by a suite of analytics that enable them to have the right conversation with your clients at the right time.
5. **Secure Portals:** From sharing critical client reports to showcasing your firm's ESG profile, secure portals transform your relationship with your customers and create efficiency.

Driving Value

In the current climate, asset and wealth managers are under extreme pressure to raise assets quickly while lowering cost ratios. In order to grow, the distribution and service organization must operate with the utmost efficiency and beat the competition – something that is only made possible through investment in technology. Kurtosys provides a unique opportunity for asset managers to create class leading levels of performance within distribution at a fraction of the cost of other solutions. Our track record speaks for itself:

- **300bn+ European Asset Manager:** New UCITS site and fund buying experience brought to market in 4 months. €2m+ saved annually.
- **500bn+ European Asset Manager:** 10k marketing documents produced every month, distributed on average by fifth business day. €4m saved annually.
- **800bn+ Global Asset Manager:** All global sites and marketing material production centralized with Kurtosys.
- **70bn+ UK Asset Manager:** Seven disparate vendors consolidated onto Kurtosys. £1.5m saved on license fees and integrations.
- **1.5tn+ Global Asset Manager:** Sales enablement portal, directly responsible for several billion in new asset flows within first six months of use.

The Platform

Kurtosys is comprised of five complimentary and integrated modules that work in harmony to enable key business outcomes:

- **Data:** A concordant hub for the fund and investor data that powers your experience; key facts, holdings, performance, disclaimers and even translations.
- **Studio:** A library of advanced user experience modules that solve for the hardest parts of your sites, portals, and sales collateral. From a performance chart to a fund center, studio allows business analysts and marketing professional to curate a compliant library of interactive tools that can be used across the entire sales, marketing, and client service ecosystem – all with zero coding.

- **DXM:** A cutting edge digital experience management system built for the specific needs of asset and wealth management. Founded on an intuitive drag and drop site builder and complemented by an array of experience management features, DXM also contains the modules required to maintain a compliant website, such as page snapshotting and content expiry.
- **Documents:** Fully integrated with Kurtosys Data and Studio, Kurtosys Documents allows data heavy content to be automated at scale from rules-based templates. Documents can be authored in InDesign or Office and distributed at scale.
- **Communities:** Leverage the power of DXM to create powerful portal experiences for clients and salespeople: from enablement hubs to institutional client reporting portals.

The Kurtosys Difference

Kurtosys is unlike other solutions on the market, here's why:

- **We live asset and wealth management:** Over 200 people in five global locations live and breathe the business of raising and retaining assets. Our teams are continually looking for new ways to help our clients improve their businesses, and we are fanatical about helping our customers reach their goals.
- **We believe in partnership:** We are not just a tech platform; we are a true partner to our clients. When we enter into a business relationship, our teams strive to understand the goals of our customers and make them our own.
- **Zero coding:** We've built a platform specifically for our industry, and specifically so you don't need to build any costly custom features. Everything in our platform is configured not coded, lowering time to value and cost drastically.
- **Fully Compliant, Fully Global:** Because we work with a wide array of global financial institutions, our solutions allow you to easily comply with local market regulations and to localize your content for your clients in different parts of the world automatically.
- **Batteries Included:** Kurtosys isn't just software, we provide an entire platform as a service (PaaS) to run your sites, portals, and content production workflows. You simply bring your data, design, and inspiration, and you are ready to go.

About Kurtosys

Kurtosys empowers financial services firms to create powerful investor experiences and lasting customer relationships through efficient automation of key sales, marketing and customer service processes.

The company provides an end-to-end digital experience platform (DXP) that enables firms to create, manage, publish and optimize all their financial data, documents, websites and content in a secure, compliant environment.

As a result, it is trusted by the world's leading investment brands to mitigate their risks and reduce their costs while providing the agility to ensure they are first to market.

Kurtosys solutions include secure websites and portals, interactive data tools and apps, automated sales presentations, marketing collateral and reporting and document libraries.

Kurtosys architecture is underpinned by robust and scalable infrastructure using the latest Cloud technologies and supported by teams that understand information design, industry regulations and compliance issues and working at scale with data.

We are an ISO 27001 certified company. We have implemented a comprehensive information security management system to protect customer services including datacentre protection, business continuity, risk assessment and incident management.

Founded in 2002, Kurtosys was funded from Silicon Valley investment and operates across three global offices, employing over 200 people. The company works with some of the world's largest financial brands, including banks, wealth managers, mutual fund providers and alternative investments.

Contact Kurtosys

Whether you're a bank, private equity firm or an asset manager, looking to build a brand new website, client portal or product campaign, or whether you just need to improve your data visualization or get your marketing documents out faster – get in touch!

Visit www.kurtosys.com to learn more.

Visit www.kurtosys.com/contact to request a free demo.

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