



NEWS RELEASE

# SS&C Announces Collaboration with Morningstar Sustainalytics to Expand Access to ESG Research, Data, and Analytics

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WINDSOR, Conn., April 27, 2022 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced it will integrate Sustainalytics' ESG data into SS&C Advent platforms to power portfolio management and analytics workflows for its global client base. Morningstar Sustainalytics is a leading global provider of ESG research, ratings and data.

"We are excited to work with Morningstar Sustainalytics to make sustainable investing analytics available to our clients," said Steve Leivent, Co-General Manager of SS&C Advent. "ESG investing has quickly become a dominant force driving global investor and portfolio allocation decisions, and this collaboration allows us to deliver turnkey access to powerful, comprehensive ESG analytics and reporting."

Many separate account managers are still in the early stages of incorporating ESG factors into portfolio analysis, construction, and investor conversations. Through the integration, managers and advisors will be able to align investor values with ESG-focused investment styles and easily pair Advent's portfolio data with ESG data for internal management and client communications. In addition, by providing market leading clarity, the integration will strengthen the portfolio analytics experience for a firm's front and middle office teams.

"Sustainalytics is delighted to provide our industry-leading ESG research, data, and analytics to SS&C's investor clients," said Mira Vasani, Global Wealth Technology Practice Lead at Sustainalytics. "With the addition of our ESG

insights to SS&C's powerful platforms, asset and wealth management firms will be able to better understand the ESG risks facing their portfolio companies. We look forward to seeing how SS&C's clients leverage our ESG information and to further expanding our relationship."

The Sustainalytics ESG data integration will be made available on SS&C Advent's Genesis Platform and the Black Diamond Wealth Platform in the second half of 2022. The Genesis Platform leverages modern cloud technology built on a singular data store, solving critical portfolio management, analytics and trading issues for front and middle office teams within global asset and wealth management firms. This new capability is offered in addition to SS&C's ESG solutions platform, which also leverages Sustainalytics data.

#### SS&C Technologies

SS&C is a global provider of services and software for the financial services and healthcare industries. Founded in 1986, SS&C is headquartered in Windsor, Connecticut, and has offices around the world. Some 18,000 financial services and healthcare organizations, from the world's largest companies to small and mid-market firms, rely on SS&C for expertise, scale and technology.

Additional information about SS&C (Nasdaq: SSNC) is available at [www.ssctech.com](http://www.ssctech.com).

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