



## NEWS RELEASE

# SS&C Technologies Propels Financial Services into the Future with Groundbreaking Solutions Unveiled at Deliver 2023

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Premier technology conference draws 1000+ leaders across financial services

Innovation Takes Center Stage with Enhanced Fund Administration, Loan Data, Private Market Services, and a Preview into the Future of Intelligent Automation

Decorated fighter pilot, author and businessman Major General John Borling headlines a strong program of expert speakers

WINDSOR, Conn., Oct. 23, 2023 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today showcased pioneering solutions aimed at providing unparalleled value to investment managers during the SS&C Deliver Conference. The conference, which assembled over 1000 leaders from across the financial services industry, presented in-depth insights into SS&C's latest offerings in fund administration, loans management, private markets investor services, and innovative intelligent automation technology set to redefine operational efficiency.

"We persistently evolve and innovate, ensuring our technology stays in stride with our client's present and future needs," said Bill Stone, Chairman and CEO. "Today, investment managers are looking for solutions to help them diversify and grow their business while managing operational complexity. We look forward to continuing to work with our clients to deliver tools they need to simplify their organizations so they can focus on growth."

The SS&C Deliver Conference commenced with a resonating leadership conversation between Major General John Borling and SS&C Chairman and CEO Bill Stone. This insightful dialogue set the stage for the conference and underscored the pivotal role of leadership and its intertwining with civic engagement. With an impressive lineup of more than 60 sessions, hands-on product labs, and immersive workshops, the event emerged as a nexus for learning, networking, and fostering industry collaborations.

Leading innovations unveiled:

**Next-Gen Intelligent Automation:** The preview of **SS&C Blue Prism Next Generation Platform** signaled the future of intelligent automation, boasting a cloud-native architecture to optimize operational efficiency and support process design, flexible commercial models and deployment options. The first release in Q1 2024 will support core Intelligent Automation capabilities within a hybrid deployment model. Customers can keep digital workers on their secure infrastructure, operating behind their firewalls and interacting directly with their systems and applications.

The SS&C Blue Prism Generative AI Product Incubation will accelerate the ability to rapidly develop and prove the latest generative AI capabilities, working alongside and across the portfolio of intelligent products. Focus areas include supporting customers in accelerating automation development, augmenting decisions within automation and extracting insights from unstructured data, such as emails.

**Loan Data Management:** SS&C introduced a market data solution for viewing, editing, and sending lending agent notice data directly into downstream systems, such as data warehouses or accounting platforms. Leveraging OCR and machine learning capabilities, **SS&C Loan Data** pairs with accounting systems such as Geneva to give clients control over their entire loan lifecycle processing. The system supports syndicated and private loans and provides complete transparency into the data and command of operations and reconciliation processing.

**Private Markets Transparency:** SS&C introduced **InView™**, a purpose-built portfolio management solution for LPs. The solution collects financial reports across funds from multiple sources – including **InvestorVision™**, other external systems and emails – and presents them in one user-friendly interface. InvestorVision is also being enhanced with new API connectivity, supporting integration with external CRM and accounting systems and expanded language capabilities. Recently added languages include French, Portuguese, Chinese, Japanese and Spanish, with German and Korean coming online shortly.

**Empowering Alternative Fund Operations:** **SS&C's GoCentral™** is a cutting-edge fund admin platform now powered by machine learning for advanced trend analysis and improved IBOR functions. Clients can spot discrepancies, from trade anomalies to unexpected market value changes, ensuring precise daily IBOR/NAV. The

**Reconciliation** module uses AI for thorough checks across all asset types, complemented by quick reporting and vigilant monitoring. The **Trade Operations** module offers a live, structured view of urgent trades amid shifting regulations. Dynamic alerts in **Treasury Management** notify clients of significant cash balance changes, promoting active cash management. The **Securities Financing** feature lets clients compare lending rates with prime brokers for higher returns. Lastly, the **Collateral Management** module gives instant insight into exposure and collateral needs across counterparties.

**Healthcare Industry Enhancements:** SS&C also previewed the upcoming launch of DomaniRx, its transformative data convener platform for pharmacy benefits management. Created as a joint venture with Humana and Elevance Health, DomaniRx addresses the pain points payers face today: high costs, inefficient operations, data silos and stifled innovation. The modular platform enables payers to engage with any application or system, easily manage plans, staff and turnaround times and access membership, drug, accumulator and Rx history in one place.

SS&C Technologies continues to forge ahead, sculpting the future with robust, innovative solutions and an unwavering commitment to delivering exceptional value to the financial services industry. Learn more on **ssctech.com**.

## About 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 20,000 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**.

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