



## NEWS RELEASE

# SS&C Technologies Unveils Innovative Solutions at Deliver 2025

2025-10-30

Premier technology conference draws 1,200 leaders across financial and healthcare services

WINDSOR, Conn.--(BUSINESS WIRE)-- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) unveiled a suite of next-generation solutions at its annual **SS&C Deliver 2025** conference. Nearly 1,200 leaders from the financial services and healthcare industries gathered in Phoenix, Arizona, to explore how SS&C is reimagining operations through **AI, intelligent automation, and data-driven platforms**.

This year's conference marked a pivotal moment for SS&C as it showcased new innovations and welcomed **SS&C Calastone**, the recently acquired global funds network, into the SS&C family. The acquisition expands SS&C's position as the world's most connected financial technology provider, linking fund managers, distributors and investors across more than 35 markets.

"SS&C's goal is to simplify our customers' operations," said Bill Stone, Chairman and CEO. "SS&C has focused on harnessing the power of AI and automation to optimize how we deliver services. As Customer Zero, we've proven the impact of AI and automation within our own business. We achieved measurable efficiencies and built governance frameworks to ensure responsible use of these technologies. We're now applying those lessons to develop scalable, secure, and outcome driven solutions for our clients."

The conference opened with a thought-provoking keynote discussion between Bill Stone and Victor Haghani, founder of Elm Wealth and pioneer of Dynamic Index Investing®. The conversation explored how data, discipline,

and decision science are transforming the way organizations operate and invest. The dialogue underscored how the lessons of the past decade are shaping a more resilient, intelligence-driven future. These themes carried through the conference as SS&C unveiled new technologies designed to turn insight into action and innovation into measurable outcomes.

Haghani, a prolific contributor to finance literature, most recently co-authored *The Missing Billionaires: A Guide to Better Financial Decisions* (Wiley, 2023).

The innovations unveiled at Deliver 2025 share a common purpose: engineering for outcomes, integrating data across ecosystems, and empowering clients to focus on growth.

Key announcements and innovations included:

- SS&C Calastone – Making its first Deliver appearance as part of SS&C, Calastone demonstrated how its global funds network connects over 4,500 financial organizations. Integration with SS&C's data, automation, and distribution capabilities establishes a fully connected ecosystem. The combination reduces friction in fund transactions, enhances transparency and drives efficiency at scale.
- SS&C's AI agent catalogue features prebuilt, outcome-focused AI agents designed to simplify complex operations in financial services and healthcare. Delivered as a managed service, the agents help organizations overcome talent shortages and operational bottlenecks securely at scale. The offering is underpinned by AI Gateway, the company's enterprise-grade AI governance platform.
- The DomaniRx Drug Management Module modernizes drug management capabilities without disrupting operations. The module seamlessly integrates payer, pharmacy, and provider systems into one unified platform. The ability to directly connect with medical claims data provides a 360-degree view of member health information. The platform supports smarter, faster, clinically sound decisions, streamlines administrative workflows and can reduce authorization delays by up to 70%.
- SS&C Insights simplifies data management for alternative investment managers. The next-generation client hub displays timely and actionable information through a modern interface.
- SS&C Intralinks Link AI provides deal assistance capabilities across DealCentre and FundCentre. Capabilities include the 'Ask Link' conversational AI assistant, real-time document analysis, and advanced data extraction for LPs.
- SS&C Black Diamond® Wealth Solutions combines SS&C's award-winning Black Diamond Wealth Platform with SS&C's full suite of wealth management solutions to enable wealth managers to easily manage their technology and operations needs in one place.
- New operational capabilities in Genesis encompass accounting, performance, reporting, reconciliation and billing. **The SaaS platform** enables investment managers overseeing institutional and wealth strategies to

confidently track cash across multi-asset, multi-currency and advanced portfolio structures.

- Retirement plan sponsors and participants now get a personalized platform experience, simplifying data collection and digitalizing the plan onboarding process. New Gen AI capabilities for customer support include a chatbot to support financial wellness offerings.
- SS&C WalletShare enables asset management firms to optimize their distribution resources by identifying opportunities and risks across their markets. An embedded suite of analytics integrates customized, data-driven insights to scale analysis.

SS&C also hosted a spotlight stage with SS&C's senior leaders and clients. The presentations focused on practical use cases across alternatives, asset and wealth management and healthcare management. The event featured more than 90 sessions, hands-on product labs, and immersive workshops. There were also multiple opportunities for learning, networking, and fostering industry collaborations.

SS&C Technologies continues to focus on purpose-built, innovative technology and service solutions for the financial services and healthcare industries. Learn more at **[ssctech.com](https://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. More than 23,000 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](https://www.ssctech.com)**.

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Source: SS&C