KEY BENEFITS

› **Consolidated Reporting:** Whatever your fund holds, wherever assets are custodied, the Intelligent Dashboard consolidates positions and prices—and clearly shows your allocations, concentrations and portfolio-movers.

› **Exception Based Alerts:** Receive automated alerts when key performance indicators do not meet expectations. Understand changes in data faster than ever.

› **Multi-Purpose:** Configure your dashboard by different fund participants including portfolio and risk managers, chief compliance officer, chief executive officer and board members.

› **Consistent Metrics:** Measure your fund against industry benchmarks and custom or internal metrics. You also can be confident that the data you see is accurate and comparable, day-to-day or period-to-period.

› **Document/Compliance Management:** Consolidate and retrieve important documents to assist with compliance oversight tasks or SEC audits.

› **Visual Design:** Colorful, visual graphs, charts and “gauges” help you visualize trends, see relationships and make comparisons.

› **Web-Delivered:** You can log in at work, at home or on the road—24/7.

The Intelligent Dashboard solution is the one of most comprehensive business intelligence tools available in the marketplace. It is a secure, Web-based system that quickly and easily turns massive amounts of data into fact-based decisions that address tactical and strategic issues.

**Analyze Key Drivers Within Your Business**

The Intelligent Dashboard’s intuitively balanced score display monitors your firm’s key performance indicators and helps you manage your business more effectively. You can establish and monitor thresholds and, as they are breached, exception-based alerts are e-mailed to you. The dashboard provides a red/yellow/green light display of your key metrics that guides your management decisions.

**Streamline and Boost Intelligence for All Functions**

Actionable metrics are delivered when you need them—the right information to the right people at the right time.

**Get the Answers You Need Quickly and Efficiently**

Our Intelligent Dashboard eliminates the need for complex spreadsheets and individual manipulation of data. Your management team members view the same results in an easy-to-read format.

**Get the Answers to the Right People on Your Team**

Our customized access feature allows you to create specific views based on level of authority, territory or department.

**Our Suite of Intelligent Dashboards Has Been Launched in the Following Areas:**

› Sales and Distribution Management
› Compliance
› Treasury
› Securities Lending
› Subadvisor Certification
› Executive Fund Management
› Price Optimization
› Sales Performance

We can create a new dashboard specific to your business needs quickly and efficiently. Since we use our Intelligent Dashboard infrastructure to create new modules, we can deploy new dashboards faster than systems that need to be coded from scratch. With this technology advantage, and our expertise in developing new dashboards, you are not limited to one of the configurations we have already deployed.
Sample Dashboards

Executive Sales

Treasury/Fund Accounting

Securities Lending

Subadvisor Management

Platform Dashboard

For More Information

To learn more about Albridge Analytics’ Intelligent Dashboard solutions, please contact us at (855) 417-7293 or visit our website at albridge.com/analytics.

Albridge Solutions, Inc. is a leading provider of enterprise data management solutions that deliver a single view of an investor’s broad range of assets. Our proprietary technology consolidates and reconciles client account and transaction data from hundreds of data sources representing banking, brokerage, insurance, retirement, managed accounts and more. Albridge provides the foundation for financial organizations to leverage a single source of information to power a number of mission-critical technology applications. Albridge Solutions, Inc. is an affiliate of Pershing LLC, a BNY Mellon company.

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