



NEWS RELEASE

SS&C Announces 2H2020 SS&C Advent Product Updates

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WINDSOR, Conn., Nov. 17, 2020 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC), today announced releases across its full line of SS&C Advent solutions, including Advent Portfolio Exchange®, Advent Genesis®, Geneva®, Moxy® and related platforms.



"Over decades, our solutions have been built in partnership with our customers, with a focus on enhancing user

experience and streamlining operational workflows," said Karen Geiger, Senior VP and Co-General Manager, SS&C Advent. "Our continuous release schedule allows our clients to be more proactive and better positioned to take advantage of market opportunities."

Highlights of the latest releases include:

- Advent Outsourcing Services (AOS) has completed the rollout of its console, giving clients greater visibility and transparency into operational workflows, such as portfolio and market data management. The console also displays the real-time status of the automation in clients' environments, providing more efficient and effective interactions with the AOS team.
- Advent Portfolio Exchange® offers several new features in this cycle, including expanded search and favorites capabilities, so users can quickly find information. New workflows more easily create and clone portfolios, groups and composites. Improved automation to create, update and delete report macros lower client's operating costs and improve consistency.
- Advent Revenue Center® recently added scalability enhancements to improve invoice generation, forecast creation, and reporting, reducing processing times for these key areas by up to 80% relative to previous versions.
- Geneva® introduces Geneva SmartSync, the intelligent data delivery solution that eliminates batch processing and automates event-driven updates with its real-time SmartSync capabilities. The Asset Servicing workspace enables users to view system-wide events to show eligible portfolios, position impacts, and workflows. Additional enhancements include support for the transition from LIBOR to SOFR and better use of machine learning and AI for data management and governance with Lumis®.
- Advent Genesis™ recently released a new overlay portfolio management workflows for firms to manage diversified, multi-strategy portfolios and households while seamlessly integrating to the rest of the Advent Investment suite of solutions for beginning of day information and trading workflows. Additional functionality includes a new trade program allowing portfolio managers to easily reinvest proceeds from sales, enhanced restriction management workflows, and additional role-based controls.
- Tamale RMS® continues to deliver, with its sixth release this year, the introduction of task management and an enhanced contact model. By leveraging AI and Machine Learning technology, Tamale saves analysts and portfolio managers time by automatically tagging notes and files.
- Tradex®: The fund order management and distribution platform introduces new integration to Geneva World Investor®. The latest updates include new ways to automate exporting cash transactions, order instructions and settlements. Further enhancements include logging, performance and integration automation and security.
- Advent® Syncova: This flexible calculation platform continues its investment in data management, supporting the ability to archive standard margin and financing results to XML and a new series of APIs to facilitate

margin rule override management. A consolidated stand-alone utility for managing Syncova Services enables simplified installations and operations.

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 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.

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