



NEWS RELEASE

SS&C Announces 2H2021 SS&C Advent Product Updates

11/10/2021

WINDSOR, Conn., Nov. 10, 2021 /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®, Advent Outsourcing Services®, Geneva®, and other related platforms.



"The second round of 2021 product updates demonstrates our ongoing investment in technology, product

development, growth and expansion of our global offerings to support our clients as they scale," says Karen Geiger, Senior Vice President and Co-General Manager of SS&C Advent. "This release offers forward-looking technology to streamline workflows, provide key functionality to optimize operations and augments the overall user experience."

Highlights of the latest releases include:

- **Advent Outsourcing Services (AOS):** the AOS Console has deployed numerous releases, including a new API service, improved task management to track SLA progress, and a new feature to quickly request and track progress on setting up critical custodial data feeds.
- **Advent Portfolio Exchange®** created additional entity and accounting REST APIs for improved integration and scalability. In addition, further UI improvements to support Google's Chrome browser and Microsoft Edge and increased run-time improvements to Rex and Performance Update processes were added.
- **Geneva®** introduced Audit Workspace and Query Builder via the web-based Workspaces to augment the user experience. Additional enhancements include managing fund expenses, further automating options processing, and helping streamline feeds to data warehouses. As part of the Geneva experience, Advent Lumis® allows clients to manage multiple data views through a centralized, intuitive operations dashboard configurable by user, team or organization. In addition, users gain easy access to real-time data file transmission metrics, data exception details, reconciliation summary information, workflow status updates and more.
- **Advent Genesis** continued releasing features to support multi-asset-class portfolios, including new fixed-income features, enhanced order proposal optimization logic to reduce drift further and strengthen transparency and added refined order creation functionality to improve asset class rebalancing across single or multiple models.
- **Moxy®** and **Advent Rules Manager** released Advent Rules Manager NextGen to early adopter clients, expanded real-time pricing integration, and delivered various algorithmic trading enhancements for Wells Fargo Securities and Raymond James.
- **Advent Syncova** released Margin Results Workspace, a web-based screen that allows for easier navigation, added data transparency, and improves the user experience. This easily accessible workspace displays account-level results and provides the ability to trigger and publish calculations directly from the result screen.

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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