



NEWS RELEASE

## SS&C Announces Enhancements for Eze Investment Suite and Eze Eclipse

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WINDSOR, Conn., Sept. 16, 2021 /PRNewswire/ -- **SS&C Technologies Holdings, Inc.** (Nasdaq: SSNC) today announced product enhancements to its SS&C Eze platforms **Eze Investment Suite (EIS)** and **Eze Eclipse**. The platform enhancements to fixed income and automated trading reinforce SS&C Eze's leadership in front-to-back investment management workflows for its 1,900 clients.



"We were looking to provide our trading desk with a seamless front-office user experience," said Mark Citrone, Head Trader of Kerrisdale Advisers. "Eze Investment Suite provides a truly synchronized OEMS with sophisticated, real-time views that give our trading desk actionable insights. We've been really impressed with the overall configurability of the platform and the Eze service experience has been top-notch, from the sales process through implementation and training."

"We continue to invest in our offerings, showcased by exciting and meaningful product enhancements rolled out in this year," said Michael Hutner, General Manager, SS&C Eze. "In today's environment, many funds are employing more sophisticated and complex cross-asset class strategies, and our goal is to help them grow."

Highlights of the latest SS&C Eze enhancements include:

## Eze Investment Suite

- Repo Trade Ticket and Deal Manager: provides clients control over the entire repo trade lifecycle.
- Improved fixed income analytics: additional fixed-income risk metric columns allow users to assess risk across portfolios from a single screen.
- Automated trading: EMS users can share their enhanced algo wheel configurations across trading desks with other users and pair with automated trading functionality to optimize trades.
- Modeling/Portfolio Management : new look-through capabilities allow portfolio managers to split composite securities into constituents in portfolio modeling.
- ESG: better integration of ESG data makes it easier for clients to manage their ESG portfolios, while enhanced analytics grids help clients track which securities meet their ESG criteria.
- Auto Trade Sync (OMS/EMS integration): clients can see their trades automatically synchronize across blotters in real-time for an expanded set of trade-edit and routing workflows.
- Expanded Multi-Asset Accounting: new intra-day valuation capabilities for ETFs, Money Market Mutual Funds, and Unit Trusts.

## Eze Eclipse

- Mobile app improvements: enter and route trades for execution from the mobile app. New security features include multi-factor and biometrics authentication.
- Expanded the Eze Eclipse liquidity network: More than 200 execution destinations across APAC, EMEA and Americas are available.
- Modeling/Portfolio Management: look-through capabilities have been extended to split composite securities into constituents directly in what-if analysis workflows for portfolio managers."
- Short Locate: locate requests scheduling with a single click.

- Fixed income: new fixed income trading ticket streamlines workflow for trading fixed income instruments.

SS&C Eze added 121 clients to its flagship Eze Investment Suite in 2021, with the majority deploying the software in the cloud. Eze Eclipse now has more than 200 clients live on the native cloud platform, with more than 40% of firms using its new **mobile app**.


## 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](http://www.ssctech.com).

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