

Investment Manager Assessment



Securely evaluate, qualify and monitor your investment manager relationships—anytime and anywhere.

Intermediaries have a fiduciary responsibility to continuously evaluate and qualify their investment manager partners and products to ensure they offer quality products to investors. BNY Mellon Intermediary Analytics provides an investment manager assessment solution designed to help fund distributors streamline the critical task of evaluating, qualifying and monitoring investment manager relationships.

Intermediary Analytics by the Numbers



More than 500 asset managers leverage our solution



Over 1 million questions answered through our automated compliance questionnaires



More than 8 years experience supporting subadvisor oversight

Manage Complex Tasks More Efficiently

Our Investment Manager Assessment Solution provides your staff better analytics, reporting and enhanced risk mitigation in a secured and controlled environment with a customizable interface. These features reduce the time and resources you need to spend on evaluating and qualifying managers.

Support for Comprehensive yet Efficient Due Diligence

- Manage legal and operational responsibilities more efficiently and mitigate manager-specific risks.
- Evaluate and measure your overall investment manager relationships.
- Streamline your workflow with an audit-ready process, including access to a consistent audit trail.
- Develop questionnaires to pinpoint specific qualitative and quantitative categories for targeted product selection and ongoing maintenance.
- Understand how specific capabilities align with strategic opportunities in your product platforms, with a broader overview of the product universe.
- Improve processes for investment managers through task delegation, automated alerts and streamlined paperwork.
- Reduce time and resources spent by your staff and investment managers on document preparation, data input, error correction, and submission and retrieval.
- Consolidate and store due diligence responses needed to help satisfy a variety of compliance guidelines.
- Aggregate investment manager responses along with a summary of performance, sales and assets under management.
- Enable alerts to reportable changes and breaches of specific thresholds.

FOR MORE INFORMATION

To learn more about BNY Mellon Intermediary Analytics and our Investment Manager Assessment Solution, please visit bnymellon.com.





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