



Autus
Data Services

Platformation

Turning Platform data into
actionable information

Background

Most Asset Managers' Funds are held on Platforms. These Platforms send spreadsheets in different formats and with inconsistent data items making it difficult to get a clear picture of what is happening or drive actionable insights.

Platformation has been designed for organisations who want to turn this data into valuable information which can be used in CRM systems and BI tools.



How it works

You send us the data from each platform each month. We standardise the disparate formats and use our enhanced FCA universe to ensure consistency of the data across the various feeds.

The files are often missing crucial data like Firm Reference Number (FRN) and Fund/Sector information (ISIN) which we add to ensure a more complete view of your distribution landscape.

The consolidated/cleansed data is then returned in a variety of formats to make it easy to bring into your CRM or BI tools or simply to analyse in Excel.

Features

- *Consolidates the disparate Platform data into a single, easy to use file*
- *Fills in missing information like FRN's and ISIN's where missing*
- *Uses our enhanced FCA Register universe to ensure completeness and accuracy of the data*
- *Data is returned in a variety of levels of aggregation so it is easy to bring into CRM or BI tools*
- *Consolidation of both AUM and sales/redemptions/net sales available*

Benefits

- *Quick, accurate consolidation of vitally important information without using scarce internal resources*
- *Simple to analyse in Excel and easy to bring into other systems*
- *Understand which firms are holding which assets*
- *Identify firms with very positive or negative net sales*
- *See sector trends earlier than your competitors*

Delivery

Secure file transfer.



For more information please email
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