axxsys

The Leading Independent Asset Management Consultancy
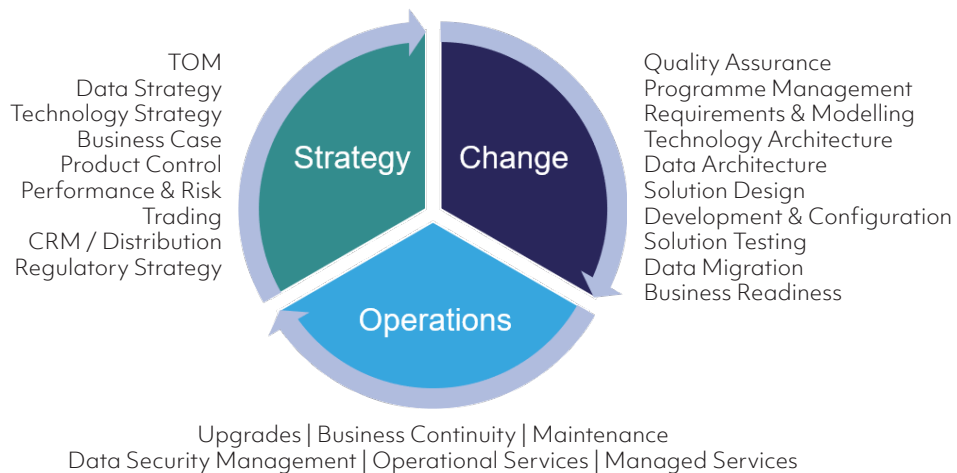## System Expertise - Simcorp Coric®

Since our inception in 2003, we have provided specialised consultancy to the global investment management community, providing Advisory Services and Strategic Planning through to full delivery of Major Change Programmes.

Our core proposition is around our 50+ trusted, highly skilled and knowledgeable industry practitioners who ensure firms achieve outstanding outcomes from their business or technology integration projects. We are proud of our 'trusted implementor' reputation developed with our clients over many years of successful project execution.

This reputation is particularly prevalent with firms using **SimCorp Coric®**. Axxsys have led many high profile projects involving SimCorp Coric, including full end-to-end implementations, migrations, and upgrade projects using the skills and expertise of our industry consultants who have a deep hands-on knowledge of the platform

Axxsys are part of the Alpha Group, the leading global wealth and asset management consultancy with more than 500 consultants, Axxsys operate from 12 offices worldwide.

Our Practices

TOM
Data Strategy
Technology Strategy
Business Case
Product Control
Performance & Risk
Trading
CRM / Distribution
Regulatory Strategy

Strategy — **Change** — **Operations**

Quality Assurance
Programme Management
Requirements & Modelling
Technology Architecture
Data Architecture
Solution Design
Development & Configuration
Solution Testing
Data Migration
Business Readiness

Upgrades | Business Continuity | Maintenance
Data Security Management | Operational Services | Managed Services

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Our SimCorp Coric® Credentials

Helping clients unlock the SimCorp Coric Potential

Our focus is to ensure that our clients receive the expected return on the investment in SimCorp Coric, and get tangible benefits in business processes and investment decision making, based on the current and future needs of the business.

We have SimCorp Coric consultants across the globe

Consultants who have successfully led the largest SimCorp Coric projects in North America and UK. We ensure our clients achieve the operational efficiencies, running cost efficiencies and return on their investment in SimCorp Coric.

We support the complete SimCorp Coric delivery life-cycle

Axxsys Consulting provide Target Operating Model, Solution Design and Implementation consultancy on a number of applications, including SimCorp Coric, as well as post implementation and operational support services to the Asset Management industry.

We have deep technical SimCorp Coric expertise

We specialise in buy-side firms and with 10+ years of working with SimCorp Coric we can help translate business requirements into a system configuration. We can speed up the process with our knowledge of the product and our understanding of the business.

We have been implementing SimCorp Coric since 2010

We currently have 20+ consultants with SimCorp Coric experience including consultants with 10+ years of experience on the product. We started working with SimCorp Coric clients in 2010 and have since worked with more than 20 clients world-wide.

We have extensive project delivery expertise

Deep experience of both project management and technical for SimCorp Coric, including vendor management and commercial contract review. We offer guidance and best practice of the different possibilities within the system from a configuration perspective.

Example SimCorp Coric® Client Engagements

We have been involved in over 20 major Data Management and Reporting projects for global asset managers in the UK, Europe and North America, here are two example client engagements:

Business Optimisation Review of Reporting Solutions

A US based global asset manager with $2 trillion assets under management needed a thorough overhaul of their reporting operation and platform. They were facing many challenges with production and distribution of Fund Fact Sheets and Pitch Books.

The Axxsys team built a model for the future state of client reporting in the business. A plan was produced stating the phased recommendations with associated high-level costs.

The plan provided set out a clear track for the firm to follow to gain control over their client reporting, and allow them to scale efficiently, respond to changes promptly whilst controlling costs.

Consolidation of Reporting Solutions

A global asset manager with over $140 billion assets under management was running two reporting systems and looking to rationalise their platform to better support the business. Their existing set up lacked scalability across the business and they had difficulty meeting SLAs for clients and investors. The set up was also costly with expensive vendor hosting and change management fees. The client chose SimCorp Coric® but did not have sufficient in-house expertise to manage the implementation.

Axxsys™ were engaged to manage the integration and configuration of the in-house solution into one reporting solution on SimCorp Coric. The team worked on reconfiguring database tables and created a new data warehouse which was linked to a new document warehouse. Axxsys assisted throughout the entire life cycle of the project. The implementation was completed on time and budget.

Why Partner With Axxsys Consulting?

Some of the worlds leading asset managers and largest SimCorp Coric® clients have partnered with Axxsys for Data Management & Reporting projects due to our **strong reputation and extensive experience in the market** which is based on our:

- Strong understanding of the global asset management sector
- Exceptional knowledge of SimCorp Coric including 20+ consultants with extensive experience of the platform
- Track record of assisting in over 20+ SimCorp Coric migrations and implementations in North America and Europe
- Very tight control over QA processes ensure the business achieves its goals
- Axxelerator Platform™ provides a delivery framework for SimCorp Coric projects enabling a rapid time to market

The Axxsys team have the resource profiles required to deliver successful projects. Here is a typical example our consultants' expertise on SimCorp Coric projects:

- **Experience:** 6.5 Years SimCorp Coric Experience; 12+ Years Industry Experience
- **Degree:** B.S. Computer Science
- **Programming Languages:** SQL, T-SQL, .NET, C#, VB, VBA, .NET, Java, HTML, CSS, JavaScript, PHP, MySQL, PowerShell, XML
- **Report Types Expertise:** Factsheets, ESG Reports, Pitch Books, Performance Reports, etc.
- **Key Projects**:
  Global Asset Manager, US based, AUM $2.6 trillion – Full end to end implementation of Excel based reporting solutions through SimCorp Coric. Trained and developed a scalable solution for self-sustainability and growth.
  Global Asset Manager, AUM $4.2 trillion – Full end to end implementation of Factsheets and Quarterly Performance Reports through SimCorp Coric. Also completed Coric version upgrades and regression testing.

In addition to strong systems expertise we also provide a broad range of highly qualified **specialist resources** such as:
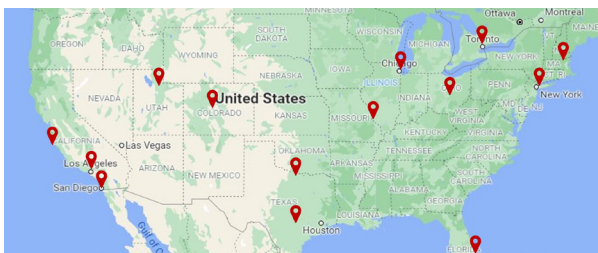
- Project Managers
- Data Architects
- Solution Architects
- Business Analysts
- Data Analysts
- Developers
- Installation Experts
- Testing and QA Experts

A Full Range of SimCorp Coric® Services From Axxsys

Axxsys SimCorp Coric End-to-End Implementation Services
Axxsys SimCorp Coric Migrations & Deployment Services
Axxsys SimCorp Coric System Set-Up & Configuration
Axxsys SimCorp Coric Backlog Remediation & Operational Support
Axxsys SimCorp Coric Requirements Gathering, Analysis, & Design
Axxsys SimCorp Coric Version Upgrades and Regression Testing
Axxsys SimCorp Coric Workflow Design and Implementation
Axxsys SimCorp Coric QA Support and Best Practices
Axxsys SimCorp Coric Project Management using Agile SCRUM Framework
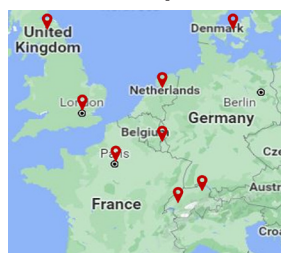Axxsys SimCorp Coric Installation Support

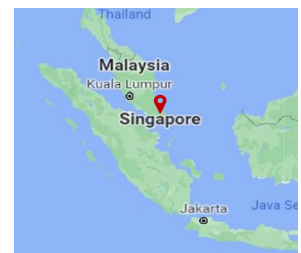## Our Global Office Network

North America

Austin • Columbus • Chicago • Los Angeles • San Francisco
San Diego • Denver • Dallas • NYC • Boston • Miami
St Louis, MO • Salt Lake City • Toronto

Europe

London • Edinburgh
Copenhagen • Paris • Zurich
Geneva • Amsterdam

Asia

Singapore

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