

Eze Software Partners with Sherpa Funds Technology On Risk Modeling

Rigorous Data Governance Elevates Portfolio Construction

Singapore, May 24, 2018 – Eze Software, a provider of global investment technology, has partnered with Sherpa Funds Technology to offer advanced portfolio construction and factor analytics capabilities to its clients. Sherpa provides tools that help funds build portfolios that dynamically express investment managers' alpha decisions, their risk appetite and market conditions. The technology enables portfolio managers to deliver more consistent and better returns whilst matching the risk exposure objectives of investors and consultants.

“We are always looking for ways to help our clients simplify their portfolio construction processes, enabling them to generate better returns while minimizing unwanted risk,” said R.G. Manalac, Managing Director, Asia Pacific. “This partnership will enable our users to account for all their business goals while optimizing their portfolios by accessing Sherpa’s time-tested models and processes, aided by Eze OMS.”

Clients can specify criteria they want their portfolios to follow, including liquidity, style factor, yield and sector exposures, access Sherpa’s powerful risk portfolio and performance analytics, and receive a portfolio construction that best expresses their alpha. The suggested portfolio can then be seamlessly loaded into Eze OMS and implemented.

“Partnering with Eze allows Sherpa to deliver its state-of-the-art portfolio processes to Eze's client base with very little integration overhead,” said Richard Waddington, CEO of Sherpa. “This added functionality extends Eze's operational and execution strengths into the decision-making area, where Portfolio Managers, Investor Relations and CIOs can design and deliver product that expresses Alpha in a way that matches their investors’ wishes.”

About Sherpa Funds Technology

Founded in 2013, Sherpa is the result of 20 years of risk and trading experience, coupled with a deep quantitative approach and delivered by powerful computational engines. Sherpa delivers enhanced process and analytics to multi-billion asset managers of all types, helping them make the most of their decision-making by applying their ideas in their portfolios in a consistent and rigorous way. Sherpa believes strongly that by using computer power and structured data they can help clients implement their decisions in a manner that enhances their business. For more information, visit www.SherpaFundsTech.com.

About Eze Software

Eze Software is a global leading provider of investment management software solutions designed to optimize operational and investment alpha throughout the entire investment process. Eze Software provides the platform for growth for the entire investment management community, maximizing

efficiencies across order management, trade execution & analytics, portfolio analytics & modeling, compliance & regulatory reporting, commission management, and portfolio & investor accounting. For more than 20 years Boston-based Eze Software has been driving innovation in financial technology. Today, Eze Software partners with more than 2,500 buy- and sell-side institutions in 45 countries from their 14 offices worldwide. For more information, visit www.ezesoft.com.