

ThoughtFocus Powers Global Growth for CLO Market Maker

- Global Alternative Asset Institution
- \$35B+ AUM
- Award-Winning, Industry-recognized CLO Manager

CHALLENGE

Scaling technology & operations

As a growing, global corporate and structured credit specialist, this company faced multiple acquisitions, redesigned their investment strategy to launch new products and funds, and took the firm public. But as the firm grew, so did its complexity. Multiple, disparate systems, manual processes, and inconsistent reporting defined the firm's operating environment and hindered its ability to scale and expand globally. They needed a strategic partner to provide deep domain and technical expertise to help fuel its global growth.

SOLUTION

Strategic advisor & solutions

ThoughtFocus applied its domain expertise to streamline and integrate systems, processes, and data workflows across this company's complex business environment. Through custom technology solutions, ThoughtFocus delivered scalable, seamless, front-to-back integration of processes across orders, trade & cash settlements and reconciliations, and portfolio accounting solutions. ThoughtFocus developed a centralized data repository, providing the business insights needed to scale operations and propel global expansion. By applying their extensive domain experience and expertise, ThoughtFocus became their trusted voice.

RESULTS

5X
GROWTH IN AUM

300+
INSTITUTIONAL
INVESTOR EXPERIENCES

GEOGRAPHICAL
EXPANSION INTO
GLOBAL MARKETS

REDUCED
DEVELOPMENT CYCLE,
TIME FOR SCALABLE
CUSTOM SOLUTIONS

As a trusted, strategic advisor, ThoughtFocus supported the growing complexity this institution's investment strategy, resulting in a more productive investment rate of return.

TIMELINE

2014

ThoughtFocus initiated partnership, providing domain and technology expertise and consultation to streamline systems and processes.

2016

ThoughtFocus delivered robust, integrated platform and centralized data repository with offshore reconciliation services.

2018

ThoughtFocus initiated SharePoint services with integration to firmwide applications; expanded offshore operational footprint.

2020

ThoughtFocus transformational year punctuated by expansion of services to support 75% of clients processes and reporting and 2x team growth.

2021

ThoughtFocus' role was elevated in risk reporting & performance attributions; expanded the operations team & doubled the scope of operations services using offshore resources.

BENEFITS

Trusted advisor and technology partner



ThoughtFocus deployed technology experts to **improve efficiency** by integrating data workflows across front, middle, and back-office systems and processes.



This company relied on ThoughtFocus to **centralize firm-wide data and reporting** across multiple systems, data sources, and data workflows.



As a strategic advisor, ThoughtFocus helped shape & diversify investment strategies, resulting in **more efficient rates of return**.



As a **trusted partner**, ThoughtFocus quickly delivered scalable solutions, enabling client to contain costs and reduce risk.

ThoughtFocus helps forward-looking companies innovate. We are a technology leader in financial services and manufacturing. Our innovative and cutting-edge technology solutions enable new capabilities to be deployed faster, deliver better user experiences, and reduce operating costs. We do this through executional excellence, guaranteeing innovation, and mitigating the risk of change. ThoughtFocus has a single mission – helping you achieve a better future faster.

We are a US based privately held company funded by Blackstone with over 2300 employees across offices in 5 different countries.