

# A Global Asset Manager Realizes Operational Alpha In Private Markets

## The Client

Global multi-asset manager with \$500+ billion in assets under management (AUM)

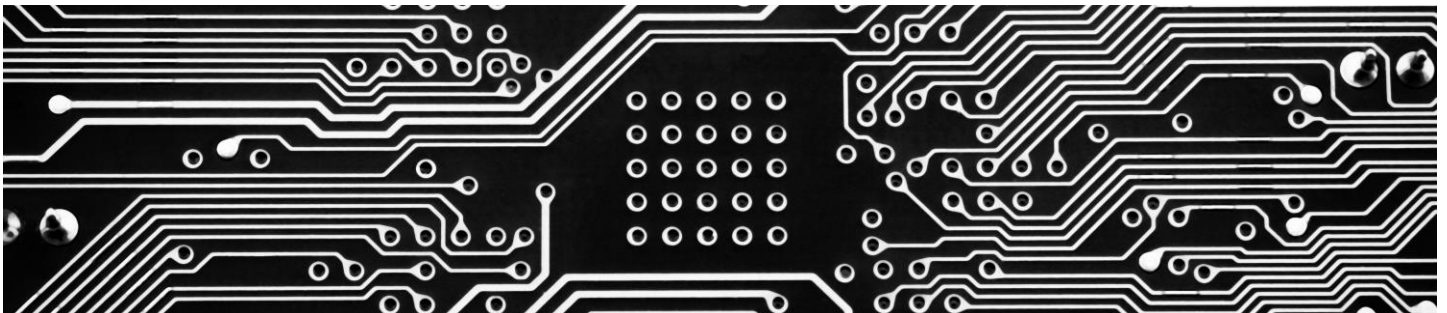
## Users

Technology, Operations team

As asset managers operating in the private markets navigate ongoing volatility and the growing pains of a continuously maturing industry, asset managers need a smart, forward-looking operational approach. They must consider a range of factors, from talent retention and technology to sustainability reporting and regulatory concerns, to achieve their short-and-long term investment goals.

To maximize value for investors in a highly competitive environment, asset managers have turned to new investment strategies, geographies, and industries; in turn, they have stretched their teams and operations to manage the data workflows of an increasingly complex investment portfolio. As financial, operational, and ESG reporting requirements mount, technology has become an essential cornerstone of investor operations to meet these data demands at scale.

The technology and operations team at this global multi-asset manager was similarly charged with tracking financial, operational, and sustainability data on existing and new investment strategies via iLEVEL, S&P Global Market Intelligence's solution for private asset portfolio management. Key objectives included onboarding a new investment strategy, driving global platform adoption, and facilitating sustainability data tracking and reporting. The pillars of this initiative were to provide strategic advantage through information, drive operational efficiencies, and deliver unparalleled transparency and insights.



## Key Challenges

Members of the technology and operations team were challenged to adapt their existing iLEVEL portfolio management solution to meet the following functional requirements:

- Track existing multi-strategy investments (Private Equity, Credit, etc.) within iLEVEL
- Implement new investment strategies (ESG, Real Estate, etc.) into iLEVEL
- Facilitate a global implementation
- Drive global platform adoption across all investment strategies
- Captain sustainability tracking and reporting

While also delivering on the following business requirements:

- Maintain business as usual (BAU) operations
- Identify qualified resources to support the iLEVEL solution
- Maximize technology to generate strategic advantage through information, operational efficiencies, and transparency

**“It was critical that the technology and operations team adopt a culture of maximizing value through technology. This approach to technology management is what ultimately drives strategic advantage through information.”**

Andy McQuarrie, Executive  
Director S&P Global

## The Solution

With unparalleled expertise that connects clients to the power of private markets, iLEVEL Expert Services helps investors achieve the 'art of the possible' by driving innovation and excellence in their operating models.



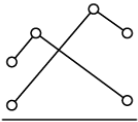
### Resource Management

Scale your operations without adding staff. Gain flexibility in managing ongoing operations, advancing key strategic projects, and more.



### Access to Expertise

Access specialized technology expertise from an experienced provider with insight into best practices used across the industry.



### Strategic Planning

Advance strategic planning capabilities with capacity-building platform optimization sessions, designed to help streamline processes and increase technology adoption across the firm.



### Operational Resiliency

Build continuity in your operations with well-documented, professional management of your technology platforms. Avoid key individual risk with built-in third-party resiliency.



### Global Implementation

Implement the latest best practices and keep your solution updated globally through structured reviews with our team.



### Sustainability Tracking & Reporting

Manage, validate, and streamline environmental, social, and governance data related to your investment portfolio. Our team helps define your sustainability strategy and oversees the implementation metric tracking on an ongoing basis.

## Key Benefits

Members of the technology and operations team knew that the iLEVEL Expert Services offering would propel their use of technology forward and enable them to make more informed investment decisions. In particular, they saw great value in being able to:

- Drive iLEVEL platform adoption for all existing and new investment strategies globally
- Develop their instance of iLEVEL in alignment with their rapidly growing and changing business needs
- Stay up to date on the most recent platform enhancement on an ongoing basis
- Extend the reach of their team to optimize platform utilization while maintaining business as usual operations

## iLEVEL Expert Services for Private Markets

S&P Global Market Intelligence is committed to working with private market fund managers and investors to help them achieve greater strategic value through technology.

Advisory and Expert Services helps investors manage resources, access the best industry expertise, and build strategies that leverage technology solutions to meet core goals and objectives. This continuous support model provides flexibility as client needs evolve.

Click [here](#) to learn more about iLEVEL, including Expert Services.

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