

Advisory and Expert Services for Private Markets

Unparalleled expertise that connects you to the power of Market Intelligence software platforms

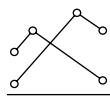
S&P Global Market Intelligence's Software Solutions Advisory and Expert Services helps private markets fund managers and investors achieve greater efficiency for a wide range of operational functions.

Advisory and Expert Services helps investors manage resources, access the best industry expertise, and build strategies to leverage technology solutions to meet core goals and objectives. Get tailored services for your specific needs and priorities with a flexible "a la carte" menu that evolves with your portfolio management needs.



Efficient resource management

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



Access to expertise

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



Strategic planning

Advance your strategic planning capabilities with capacity-building best-practice reviews designed to help you 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.

Key Services

Streamline platform management with a dedicated Platform Expert to assist with day-to-day management of the iLEVEL platform. Our services support all aspects of managing, maintaining, facilitating, and leveraging the software. Specific services available include data collection, reporting, and institutionalizing the organization's configuration.

Implement latest best practices and keep your solution updated through structured reviews with our team. Our SMEs will offer clients their expertise, provide timelines and make recommendations to review and assess the state of the solution and help bring it to an optimal state, based on best practices.

Track and report ESG data using the iLEVEL platform.

Get guidance on the best approach to managing, validating, and streamlining ESG data at your firm. The Advisory and Expert Services team can work to define a strategy, and they can also oversee the implementation of ESG metric-tracking on an ongoing basis.

Collect and validate data for portfolio monitoring in the iLEVEL platform. The Advisory and Expert Services team can implement quality control checks in collection templates, validate data collected, and create reporting workflows to enhance transparency.

Be part of a transformative data community

Our consultants lean on their broad knowledge of implementing technology for private asset managers and years of experience supporting the iLEVEL platform. The Advisory and Expert Services team's subject matter experts have extensive knowledge of private market operations, portfolio monitoring, data management, ESG best practices, and beyond.

“The Expert Services team explores the ‘art of the possible’—a consultative approach to drive innovation in your operating model, from industry leaders who have been in your shoes and know operational excellence.”

Andy McQuarrie

Executive Director, Private Markets
Advisory and Expert Services,
S&P Global Market Intelligence

How can our team help you?

The Advisory and Expert Services team includes a mix of experience and roles. Project teams will vary depending on the engagement, projects at hand and the timeline.

- Business Analyst: Provides the cornerstone of the global support model.
- Senior Consultant: Drives engagement and meets outlined objectives.
- Principal Consultant: Sets overall vision and structure to engagement.
- Expert/Subject Matter Expert: Provides specialized expertise in both platforms and industry topics.

Key Facts

Over 80+ years

of combined experience across the team supporting and consulting with customers like you.

95% of users

continue to expand their use to accelerate objectives and streamline efficiencies.

Experienced team with a track record of 700+ users

of our multi-asset portfolio monitoring system provides a Best Practice perspective.

24/7 support available

by our global team.

About S&P Global Market Intelligence

At S&P Global Market Intelligence, we understand the importance of accurate, deep, and insightful information. Our team of experts delivers unrivaled insights and leading data and technology solutions, partnering with customers to expand their perspective, operate with confidence, and make decisions with conviction.

S&P Global Market Intelligence is a division of S&P Global (NYSE: SPGI).

S&P Global is the world's foremost provider of credit ratings, benchmarks, analytics, and workflow solutions in the global capital, commodity, and automotive markets. With every one of our offerings, we help many of the world's leading organizations navigate the economic landscape so they can plan for tomorrow, today. For more information, visit www.spglobal.com/marketintelligence.

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