

Counterparty Manager: Agreement Intelligence

A new era of contract analysis at scale

Agreement Intelligence allows programmatic comparison of a firm's full universe of counterparty agreements at the clause level and provides machine-readable output for analysis and intake into downstream systems, offering a holistic view of a firm's risk and operational position.

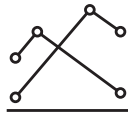
Delivering Transparency in Legal Documentation

- Quantify the impact of sanctions on investments
- Identify contracts affected by an upcoming regulatory change
- Respond to inquiries regarding contractual obligations alongside proposed business events
- Harmonize the terms of agreements with a counterparty or with many counterparties
- Optimize collateral to be used for a particular proposed engagement

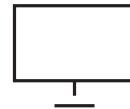
Key Benefits



Automate **identification and organization** of like documents and clauses



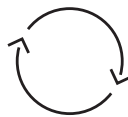
Mitigate risk from counterparty events, regulatory changes



Straight-through processing of contract data into downstream systems like OMS, collateral, etc.



Reduce FTEs required for contract review exercises



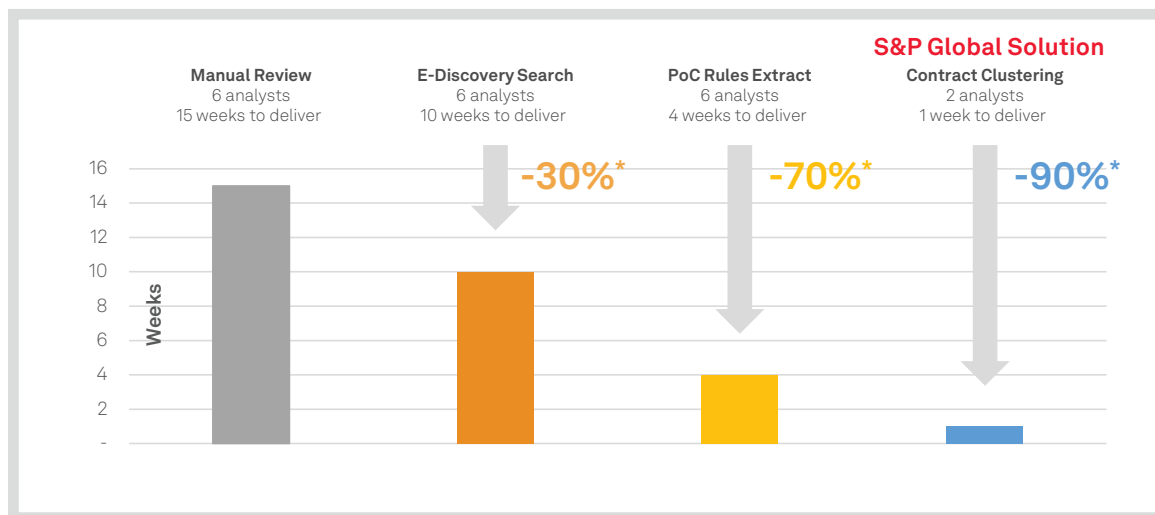
Increasing efficiency gains over time via ongoing data model improvements



Fully auditable workflow provides confidence in reporting accuracy

Contract Analysis At Scale

S&P Global Case Study



*Represents % time saving

What was analyzed?

1,000 ISDA agreements

3,500 documents

15 pages each

Assessment criteria	Manual review	E-discovery search technology	PoC rules based extract	Contract clustering tool
Ease of configuration	n/a	✓✓✓	✓	✓✓✓
Level of automation	n/a	✓	✓✓✓	✓✓
System training speed	n/a	✓✓	✓✓	✓✓✓
Accuracy	✓	✓✓	✓✓	✓✓✓
Overall efficiency	<ul style="list-style-type: none"> No prerequisite to start review (e.g. data model configuration) Significant time required for manual review to identify relevant language 	<ul style="list-style-type: none"> Easily configurable with assisted document review by providing basic location data Have to verify each search result for every document 	<ul style="list-style-type: none"> Fully automated extraction of relevant terms Significant configuration needed, reducing accuracy of extracted data 	<ul style="list-style-type: none"> Consistent approach to data capture due to clustering of like-for-like paragraphs Analyst needed to source relevant language
Legend: ✓✓✓ High ✓✓ Medium ✓ Low				

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