

SFS STRENGTHENS MULTI-CUSTODIAN INTEGRATION CAPABILITIES AMID EVOLVING MARKET NEEDS

OVERCOMING MULTI-CUSTODIAN DATA ANALYTICS AND REPORTING CHALLENGES

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[SFS](#), a fintech leader in sales reporting and data analytics for the asset management industry, streamlines and unifies data management, reporting, and analytics across multiple custodial relationships.



In an increasingly fragmented financial market, asset managers often face the challenge of consolidating sales and asset data from multiple custodians to gain a complete view of their market activity. To address this need, SFS continues to enhance its multi-[custodian](#) integration capabilities, providing asset managers with a unified, comprehensive solution for sales analytics and reporting across various platforms.

By integrating data from custodians like Charles Schwab, Fidelity, Pershing, and others, SFS' [MARS](#) Platform enables firms to streamline their reporting and decision-making processes. It helps them quickly analyze trends, target advisors, and optimize their distribution efforts. This holistic view of fund sales activity allows firms to stay agile and responsive to market shifts and provides invaluable insights that would be difficult to capture with siloed data systems.

"With firms working across multiple custodial platforms and having a unified view of sales and asset data is crucial," said Nicole Callies, Director Sales and Account Management, "MARS provides that seamless integration, helping our clients better understand their market position and confidently make strategic decisions."

In addition to offering full visibility into sales across custodians, the MARS platform also empowers asset managers with customized reporting and advanced analytics, allowing firms to generate insights that align with their specific business goals. The MARS platform's robust capabilities enable firms to dive deeper into sales patterns, identify top-performing advisors, and uncover areas of growth potential. These features are especially critical in today's financial landscape, where data-driven strategies are vital to staying ahead of the competition.

The MARS platform's multi-custodian integration enhances reporting capabilities and significantly reduces the time and effort needed to manage complex data sets. With all relevant sales data consolidated into a user-friendly interface, firms can eliminate the inefficiencies of juggling multiple systems and data sources. MARS allows asset managers to focus more on strategy and execution rather than spending valuable time reconciling inconsistent data from various custodians.

In recent months, the MARS platform has seen increased demand from firms seeking greater transparency and efficiency in their sales and asset reporting. With the ability to integrate and normalize data from leading custodians like Charles Schwab, Fidelity, and Pershing, MARS is an innovative solution for asset managers who require a reliable and scalable reporting solution. The platform's ability to adapt to evolving market needs ensures that firms have the tools to capture sales data and turn it into actionable insights for growth.

"We've designed MARS to be a flexible, all-encompassing platform that grows with our clients as their needs evolve," said Nicole Callies, "Whether they're managing data from a few custodians or dozens, MARS ensures they have a comprehensive, real-time view of their market activity, which is critical for making timely, informed decisions."

As asset managers increasingly rely on multi-custodian data to guide their strategies, SFS continues refining the MARS platform to address the industry's complex needs. With enhanced integration capabilities, the platform is poised to provide even more value as firms navigate the shifting dynamics of the financial services industry.

By simplifying data management across custodial relationships, SFS helps firms reduce complexity, increase the efficiency of their sales and marketing strategies, and open new avenues for growth. The MARS Platform's unified and streamlined approach allows firms to stay competitive in a rapidly changing market, positioning them for long-term success as they capture new opportunities and better manage their distribution efforts.

About SFS

SFS is a fintech leader in sales reporting and data management for asset management firms. With a suite of advanced data analytics and reporting tools, SFS enables firms to optimize their sales and marketing strategies, ensure data accuracy, and gain deep insights into their market performance. Trusted by asset managers across the industry, SFS continues to innovate and provide cutting-edge solutions for the evolving financial landscape.

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