markit®
Client reporting

Markit helps firms automate processes around the creation and distribution of portfolio reports, product factsheets, account statements and sales proposals to enhance client communications.

Volatility in the market is leading to an increased focus by firms on client satisfaction and retention, while new and changing regulations aimed at protecting investors are resulting in increased disclosure requirements.
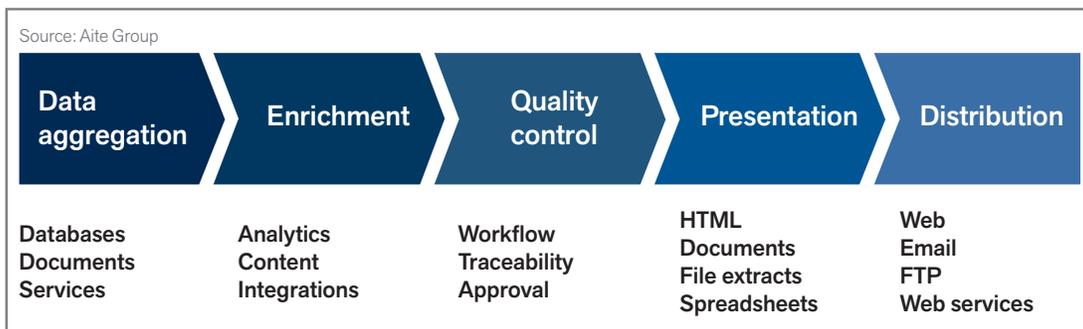
By providing an integrated data collection, management, distribution and visualisation solution, Markit helps simplify client reporting processes. We work closely with customers on content discovery and usability to create engaging and implementable visualisations of financial information for their clients.
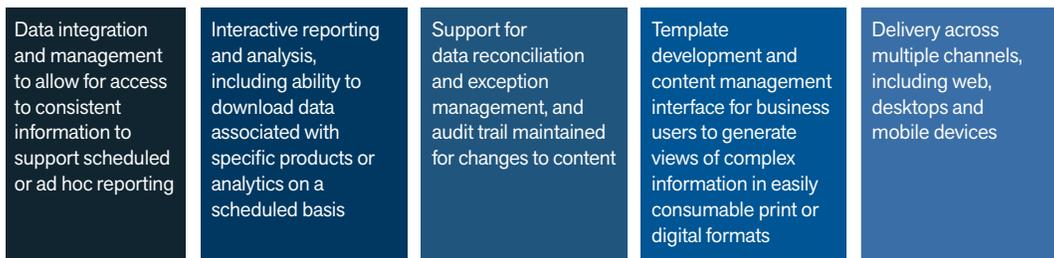
Markit delivers an end-to-end solution that supports client reporting processes.

We help address complex requirements, from the aggregation of different types of data from multiple systems to the organisation and presentation of information in easily consumable formats.

Typical lifecycle of a client reporting process

Source: Aite Group

Data aggregation	Enrichment	Quality control	Presentation	Distribution
Databases **Documents** **Services**	**Analytics** **Content** **Integrations**	**Workflow** **Traceability** **Approval**	**HTML** **Documents** **File extracts** **Spreadsheets**	**Web** **Email** **FTP** **Web services**

Markit provides

Data integration and management to allow for access to consistent information to support scheduled or ad hoc reporting	Interactive reporting and analysis, including ability to download data associated with specific products or analytics on a scheduled basis	Support for data reconciliation and exception management, and audit trail maintained for changes to content	Template development and content management interface for business users to generate views of complex information in easily consumable print or digital formats	Delivery across multiple channels, including web, desktops and mobile devices

Data aggregation

Timely and consistent data is critical to reliable reporting.

Markit offers a platform that can support the entire data lifecycle, including acquiring, transforming, validating, mastering, storing and distributing data as well as maintaining source data lineage. In addition, our solution has the flexibility to integrate with existing data management systems.

Quality control and presentation

Empower client reporting teams and business users with greater control over content.

An intuitive user interface enables business users to create, update and publish content without the need for IT intervention, while maintaining an audit trail. We can offer customised interfaces to align with specific user types, roles and requirements.

Our easy to use content management tools allow users to:

— Build and manage default settings for report templates

— Preview content in various formats before submission

— Route reports and content for approval before publishing

— Create ad hoc reports

— Manage user access and entitlement

Enrichment

Calculations and analysis are customised to your requirements.

Our solution provides the ability to quickly and easily perform custom analysis, such as the creation of specific benchmark and performance metrics, to address ad hoc client requests. Our analytical engine supports the calculation of returns over customised time periods.

Distribution

Communicate complex data to clients in a personalised and targeted manner.

Reports can be delivered across a number of channels, such as PDFs, web portals, native mobile applications and cross-platform mobile sites. We also support connectivity to third party communication outlets, including instant messaging, email and social media.

Improved client experience

Generate timely and consistent reports for your clients to improve client communications.

Efficient

Reduce manual, time-consuming processes and implement a customised solution quickly based on our existing technology.
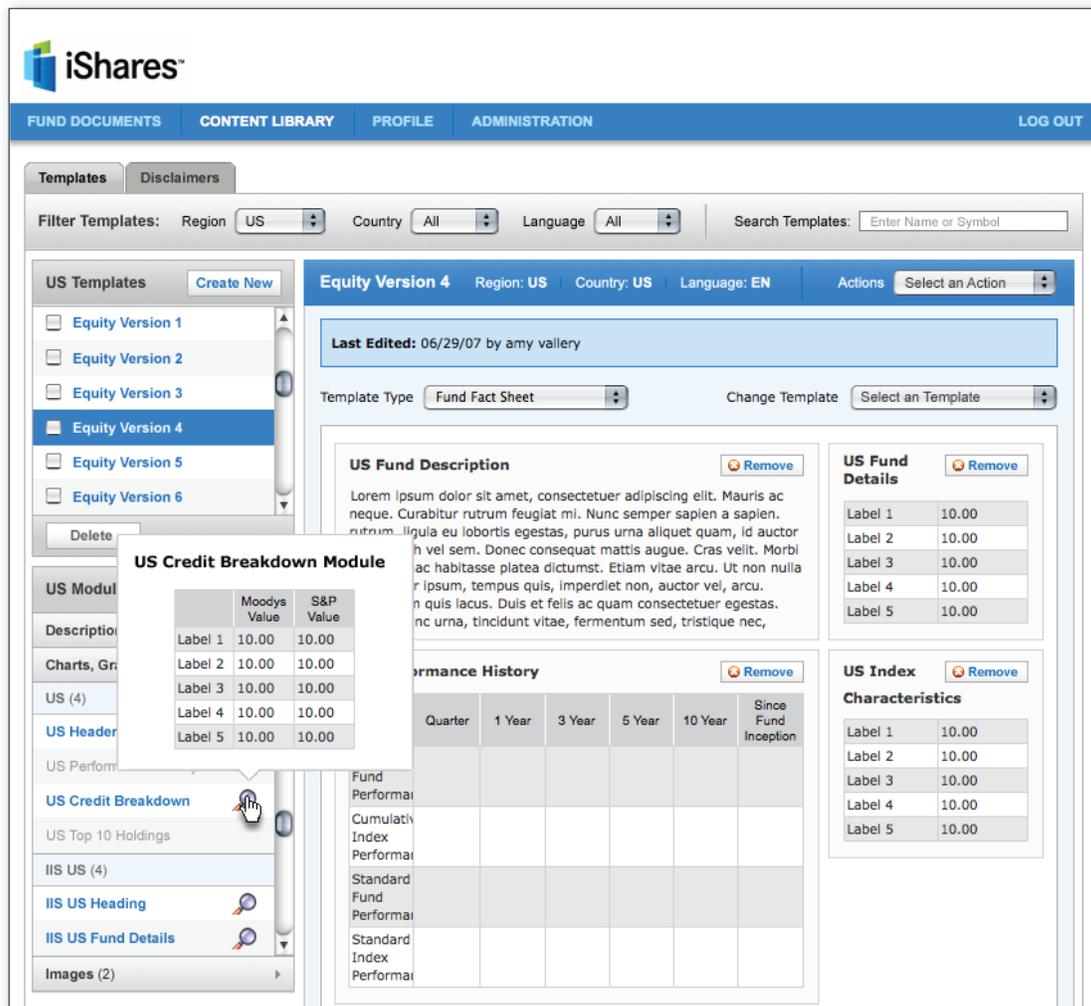
Customised workflow

Your business requirements help inform the creation of a reporting solution that fits your organisation, your brand and your clients.

Flexible

The reporting solution we build for you will be designed to grow and change with the needs of your organisation and clients.

Scalable

Automate data management processes and build report template libraries to enable scalable report production.

We created a report generation tool for iShares to enable teams globally to create, manage and publish fund factsheets for the iShares universe of ETF products across regions and languages. The publishing interface helps the firm address compliance and editing requirements.

1.5 million+ quotes served per minute

4,000+ data feeds integrated

300 million+ daily page views

40+ financial information designers

These numbers are changing as you read this

About Markit

Markit is a leading global diversified provider of financial information services. We provide products that enhance transparency, reduce risk and improve operational efficiency.

Our customers include banks, hedge funds, asset managers, central banks, regulators, auditors, fund administrators and insurance companies. Founded in 2003, we employ over 3,000 people in 10 countries.

For more information, please see **markit.com**

More Information

For more information on the products and services from Markit, please contact us at **sales@markit.com** or call one of our regional offices:

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markit®

mines data,

pools intelligence,

surfaces information,

enables transparency,

builds platforms,

provides access,

extends networks,

& transforms business.