



Existing portfolio management operating models ineffective

- > It is no secret that investment management workflows differ among asset managers today
- > While some firms are making the most of high impact innovation opportunities and scaling at speed, many businesses are unable to break down siloes and unlock efficiencies
- > For the latter, physical investment records may be difficult to trace and are often duplicated when digitised
 1. The spread of documentation across multiple locations by different stakeholders can make it hard to identify the correct document versions and keep them up to date
 2. Depending on the jurisdiction, transaction records and acquisition information kept by notaries can remain outdated for years
 3. Important property related documentation is regularly stored by different property managers who may change during the asset lifecycle
 4. Records can also end up lost as attachments in Outlook, on employee drives, computers or servers and even scattered across various cloud storage platforms

Achieve sustainable competitive advantage

- › Developing a rigorous and integrated approach to portfolio management using the right technology is key to driving growth and saving on costs
- › **Drooms PORTFOLIO** optimises business processes, delivers process light workflows and helps maintain security and control by centralising investment documentation in one place
- › Secure lasting results and true agility with **Drooms PORTFOLIO** features designed to drive value:
 1. Get a 360° overview of your portfolio and access multiple assets easily and securely on a single platform
 2. Instantly search and locate information by and across assets
 3. Enjoy speedy document review by flagging transaction relevant documents and quickly evaluating, highlighting, and validating potential areas of interest using the **Drooms Findings Manager**
 4. Provide instant access to stakeholders at asset level with the appropriate permissions and make certain contributors accountable for updating content
 5. Automate repetitive tasks like the naming of files scanned and uploaded to Drooms and the allocation of documents to their respective index points
 6. Continue aggregating and enriching asset information with Drooms' metadata feature and ensure document completeness with the right editing controls

7. Get the support you need 24/7/365 from professionals experienced in structuring and managing complex set-ups, as well as the parties involved, at speed
8. Allow users to work in their favourite language and avoid data breaches with Drooms' built-in, intelligent, translation tool
9. Get peace of mind knowing your information is handled with the highest **IT security** and data protection levels available

For more information on **Drooms PORTFOLIO**
please contact: sales@drooms.com